

Getting Started with Convio

Ensuring Success Before, During, and After Deployment

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Introduction

“Deployment” is the process of getting your new Convio-powered online solution up and running.¹ Convio’s deployment process is a repeatable, documented approach that we have refined over the last several years by working with hundreds of nonprofit organizations, hospitals and educational institutions of every size.

Deploying and making full use of Convio solutions is a joint effort that will require involvement on your part. With the proper expectations, careful planning and open communications with your Convio Project Manager and Account Manager, your deployment will go smoothly.

This guide will help you understand the entire deployment process and what it takes to be successful, including:

- Key steps and timelines for a Convio deployment
- What resources you will need to dedicate
- How to prepare for deployment
- What resources will be available to you post-deployment

If you need additional information about anything in this guide, do not hesitate to contact your Convio Account Executive (if you are currently evaluating Convio) or Account Manager (if you are already a Convio client).

Need help with Internet strategy?

Convio’s Client Success Services group offers consulting engagements to help you craft your online strategy, including the development of key goals, metrics, and a planning calendar.

Keep in mind that the ultimate success of your online (Web and email) operations hinges on *how* you use the tools we provide to support your broader organizational strategy. You should evaluate your success using Convio based on the extent to which it helps you achieve specific organizational objectives. If those objectives do not map to larger strategic goals, success meeting those objectives will not necessarily mean success for your organization. Before you begin a Convio deployment, you should be sure that both your organizational strategy and your online strategy are clearly defined and documented.

Understanding How Convio is Different

Convio software is completely different from “shrink-wrapped” or “off-the-shelf” applications like Microsoft Word® that one can simply install and start using within minutes. Key differences include:

1. *Convio software is hosted.* No software, hardware or any other equipment will be installed in your offices. The software resides on servers at a secure offsite facility. You will access the software over the Internet, using a Web browser.
2. *Convio — not your organization — will maintain the software.* Convio will take care of all routine software maintenance and product upgrades. If there are any technical problems with the software, or with the hardware that the software runs on, Convio will take care of

¹ The deployment process for Convio Email Marketing exclusively is a less involved process. Your Account Executive, Account Manager, or Project Manager can explain the differences.

that, too. These services are included in the licensing costs for our software. Some of our prospects ask us if Convio is a product or a service — it is, in fact, both.

3. *Convio software is expansive.* Convio is designed to be as easy to use as possible. Still, there are thousands of capabilities built-in to the Convio product suite, many of which can be used in a variety of ways. Of course, you will not use all of them, but mastering some of these can take time.
4. *Convio must be configured for your organization's specific needs.* Every implementation of Convio is different, because each of our clients is unique and has unique needs.
5. *Convio will work with you over the long-term.* To help ensure your success online, Convio will remain actively involved with you, from our consultative sales process, to initial training, site setup, and ongoing account management.

It is important to briefly mention what Convio is *not*. Convio is not an Internet service provider (ISP), custom software development shop, or systems integrator. We are a software company that builds tools with which *you* can build a Web site, manage email campaigns, and much more.

It may also be useful to clarify the difference between *configuration* and *customization*.

- *Configuration* is part of the Convio deployment process — tailoring your new online solution to meet your organization's specific needs. The configuration process involves making choices between pre-defined options (for example, Should the use of cookies be enabled or disabled?), or entering specific information required to make Convio work (for example, What should email auto-responder text say?).
- *Customization* involves writing or modifying Convio source code — the instructions that make the software do what it does. Convio solutions are designed to meet a broad range of needs from our clients, which generally obviates the need for any additional customization. While we occasionally develop customized solutions for clients at extra cost, this is not a primary focus for our company. Any special requests for new features or integration into other software systems would need to be scoped and priced by Convio.

Staffing Your Organization to Manage Convio

Many Convio prospects ask us:

- Will we need to hire someone to administer Convio?
- Can one person do this part-time, or is it a full-time job?
- What skills would this person (or people) need?
- How long will it take to learn how to use Convio?

The short answer to these questions is, "It depends." Through our experience deploying our software to more than 500 clients, we have seen significant variability in how clients address staffing. The factors that affect this include:

- The technical skills and related experience of your staff
- The amount of time your staff has to dedicate to using Convio
- The complexity of your planned online solution
- The number of Convio software applications your organization will use

Staffing Level

As a general guideline, Convio recommends that one full-time equivalent staff member be tasked with administering Convio. Frequently, however, two trained administrators and other staff members share online responsibilities for content publishing, email marketing and general system administration in addition to their existing responsibilities.

How much can one administrator do?

The Society for Prevention of Cruelty to Animals (SPCA) of Texas offers a great example. The organization has just one development director in charge of online and offline fundraising activities. She manages a 500+ page Web site, develops dozens of online fundraising campaigns, and creates online newsletters and other communications to many types of constituents across the country. With that one person, the organization raised more than \$220,000 online — about 55 percent of that from first-time donors — in less than two years.

This does not necessarily mean you need to hire new employees or recruit additional volunteers. As many of our clients have discovered, Convio helps take manual tasks — such as membership management and donation payment processing — online, freeing staff members from many time-consuming tasks.

Skills Required

Convio applications are designed to be easy to use. We assume, in fact, that our end users have only limited computer backgrounds. Of course, the more experience you have with Web site development, the easier our tools will be to use, and the faster you will become proficient in their

use. Familiarity with a Web development tool, such as Microsoft FrontPage or Macromedia Dreamweaver, would be valuable. Basic familiarity with HTML would also be helpful, though no HTML coding is required to use Convio.

Much more important than technical skills are communication skills. While anyone can learn how to use Convio software, being able to write effective, persuasive Web page and email content is more challenging. Because of this, many of the best Convio “admins” have a strong writing background and some solid marketing experience.

A good sense of design also is desirable. The admin should be able to evaluate what colors mix well with others, how an appealing layout looks, and so forth. Creativity — in the form of both writing and design skills — will also be useful in realizing the full benefits of Convio.

Product-Specific Skill Sets

While almost anyone can be trained to be a “general” Convio admin, achieving success with certain types of online activities may require special skills beyond those described here. For example, administering Convio Advocacy is relatively straightforward, but organizations will require someone familiar with specific policy issues, legislation and lawmakers to design effective online advocacy campaigns.

Likewise, the effective use of Convio TeamRaiser™ may require that someone in your organization provide phone- or email-based support to event participants who have questions about the events, forming teams, and so forth.

Other examples include using functionality provided by Convio partners Web Crossing (online community functionality) and cMarket (online auctions), which may require someone to moderate online discussions and manage auctions, respectively.

Sample Job Description for a Convio Administrator

Suggested Titles: Convio Administrator / Web Project Manager / Internet Marketing Manager
Often reports to a Director of Marketing or Fundraising

Objectives of this position: Increase the size of our email file and the breadth of captured constituent profile information to enable targeted marketing; increase the overall level and frequency of donations received through the Internet; increase event attendance; increase overall Web site traffic; minimize basic inquiries to the organization by providing online information regarding our services and mission.

Description

- Create and maintain a Web site that allows constituents to learn about our organization's mission and accomplishments, register for email communications and personalized content, make donations, and get information about the organization's events
- Coordinate Web site design layout and content relevancy, consistency and timeliness
- Produce monthly enewsletter
- Maintain online communications calendar for enewsletter, special event invitations and fundraising appeals
- Gather information from all departments and modify as necessary to ensure high level of Web site usability and effectiveness
- Provide senior management with monthly updates on key metrics including Web site traffic, growth and profile of the email file, and advocacy alert, fundraising and other online activity
- Identify opportunities for new online projects that drive organizational objectives
- Drive decisions within the organization for prioritizing online projects based on their impact on key metrics such as growth of the email file and fundraising
- Manage all online projects. Develop and track timelines, manage dependencies with other projects, and define resources required.

Skills

- Strong writing and editing skills
- Experience in or knowledge of marketing, communications, public relations, or a related field
- Experience with online giving and an understanding of how online content, communications, and appeals drive fundraising results
- Basic HTML and Web design skills. Familiarity with Web development tools such as Microsoft FrontPage, Macromedia Dreamweaver, NetObjects Fusion, or similar tools would be a plus.
- Familiarity with donor database administration
- Project management experience
- Ability to drive decisions within the organization regarding online content and communications
- An eye for good graphic design, attention to detail and creativity essential

Supplemental Staffing Resources

Not all organizations will have sufficient staff resources — people and skills — to manage an effective online plan. Even those that do may want supplemental assistance. For these organizations, Convio offers two optional programs: Virtual Administrator and Campaign Execution Services.

Virtual Administrator

The Virtual Administrator (VA) program dedicates a member of Convio's Services team to serve as a supplementary technical resource for you, allowing your organization to focus on advancing its mission. The VA can assist you at the time of deployment, on an ongoing basis, or both. The VA can:

- Provide content management services, including adding or modifying Web pages and editing (crop, resize, etc.) images for your site or email messages
- Set up all aspects of targeted email campaigns for fundraising, membership, events, advocacy, etc.
- Deliver and help you interpret Convio-generated reports on your online activities
- Perform data imports and exports (Convio DataSync)
- Build queries to collect constituent information
- Provide advice on best practices for using Convio solutions
- Offer one-on-one, personalized support and assistance

Although the VA does not perform some of the creative aspects of your online operations — such as writing Web site or email copy, or graphic design services — he or she can handle most other tasks that do not involve initial product configurations, product customizations, or changes to the templates on which your Web site and emails are based.

VA services are sold in blocks of hours, per month. When you need assistance, simply contact your VA and agree on a project scope, strategy and task completion time. Once the VA completes the work, he or she will review with you all the work performed for your final approval and, if you desire, will show you how to repeat such tasks in the future. Basic tasks typically are addressed within eight business hours. Delivery timelines for more complex tasks will be defined jointly.

The VA is not a replacement for the other Convio staff members who will service your account. For instance, if you encounter technical problems or have a general how-to question on using Convio, you should contact Convio Customer Support, not your VA. Your Account Manager should be your single point of contact on other issues.

Campaign and Email Newsletter Execution Services

A virtual administrator can perform the administrative steps necessary to launch a campaign, but does not develop the plans, goals, and metrics of success behind it. To address this need,

Success with Campaign Management

Using Convio's campaign execution services, our clients have seen online programs grow from \$100,000 to \$1 million in funds raised online, email files expand from 20,000 to 250,000 constituents, and online giving increases from 5 percent to 45 percent.

Convio's Client Success Services group offers campaign execution services. These services translate ideas into results through the effective use of interactive best practices, design and creative skills, and optimal implementation using Convio technology. Convio can either serve as your outsourced interactive group or supplement your existing resources. Many of our clients benefit from this service for much less than the cost of a full-time

hire — and without having to worry about ramp-up time and employee training and retention.

Convio consultants will plan, coordinate, produce and analyze a series of customized interactive campaigns (viral, fundraising, advocacy or marketing) designed to meet your organizational needs. Services include:

- Planning — Outline campaign in a campaign brief to ensure that audience, messaging, offer, landing pages and expected outcomes are agreed upon in advance
- Creative — Email and Web site design and copywriting
- Production — Convert design to HTML, configure text and HTML emails and Web pages, segment and upload data and campaign testing
- Project Management — Manage each campaign timeline to ensure that milestones are met
- Analysis — Track and report campaign results. Ongoing campaign analysis and tracking will be provided

Newsletter Best Practice Tip

Send an email newsletter or stewardship communication at least quarterly to all of your constituents.

An email newsletter often serves as the foundation for an online relationship-building program. It can provide your constituents with relevant and timely data. If your organization recognizes the need to launch or maintain a program but lacks the resources, Convio can manage the process. Convio's role in email newsletter development may include project management, production, testing, basic reporting, and newsletter archiving.

Roles and Responsibilities within Your Organization

For a successful deployment, you should first give some thought to assigning the roles described in this section. In some cases these roles will be held by the same person. Smaller organizations may only have one person tasked with all of these responsibilities. Each of these individuals should attend Convio training.

Project Lead

All organizations need to appoint a Project Leader during deployment, who may be the same person as the Convio admin. This individual will serve as the single point of contact within your organization whom Convio can contact for any issue regarding your deployment. Do not assign multiple people to this task. More importantly, make sure that this individual is empowered to make key decisions. Roles for this individual include:

- Set the scope and schedule for the deployment project
- Track overall progress in conjunction with your Convio Project Manager
- Ensure internal resources are available and aware of project priorities
- Secure buy-in from departments involved in adapting/creating business processes around Convio solutions
- Give final approval for any design work, public-facing content and functionality, and "go live" date
- Document and track long-term email marketing metrics to ensure organizational goals are met

Schedule 5-10 hours per week for project tracking through deployment, with 2-3 days for review prior to your new site going live. After launch, five hours per week should be sufficient for ensuring successful business processes, tracking metrics, and strategic planning.

Database Manager/Administrator

This is usually a fairly technical individual; often a donor database administrator. This person will only be necessary if you will require data migration or data synchronization (most organizations do; see *Data Synchronization/Data Migration*). The data migration process is a one-time event that takes approximately six hours. Setting-up a synchronization process takes longer, depending on the amount of data you wish to synchronize. Ongoing maintenance may take one or two hours per week. Roles for this individual include:

- Determine fields to be stored in constituent profiles in conjunction with online marketing profiling plan
- Enable upload and download of constituent data according to your business processes
- Assist in criteria-based query segmentation of contact database (whether by group membership, subscriber interests, geography, or other characteristics) as needed for marketing plans
- Optionally manage ongoing two-way data synchronization with offline database

Technical Contact (short-term)

Larger organizations with a dedicated IT staff should designate a technical contact to coordinate domain (Web site address) set-up. This individual will only be needed for a few hours. He or she should be familiar with the current operation of your Domain Name Service (DNS) arrangements and have the technical skills and authority to make changes. Typically, up to four hours of this person's time will be required to coordinate between Convio, your organization and your domain registrar. Additionally, this person will need to be available on the day your site goes live to support the required changes to the DNS settings, which can take 2-3 days to propagate.

The Deployment Process: Step by Step

"Deployment" is the process of getting your new Convio-powered solution up and running. *Our goal is to get this done in eight weeks*, and we usually meet this goal. The exact duration may vary based on, among other factors, how many solutions you license and how quickly you provide us with key information.

It is helpful to break the deployment process into seven general categories of activities that must be performed. These are illustrated in Figure 1. Note that some of the steps within these activities will be performed by Convio with input from you, while others will be performed by you with assistance from Convio. Also note that some of these steps must be performed sequentially, while others can be performed in parallel.

Orientation and Kick-Off Calls

The first steps in your deployment will include phone calls with the two individuals who will be your primary contacts during and after deployment.

Account Manager

The first orientation call will be between your designated Convio Account Manager (AM) and a high-level decision maker in your organization (usually your Executive Director). Your AM is the liaison between your organization and Convio throughout the life of your contract.

In the orientation call, the AM will review the deployment process outlined here and address any questions or concerns you have at that time. The purpose of this call is to provide your team with

a high-level understanding of the deployment process, training, and continued support of your Convio solutions. Through this dialogue, the Account Manager also will learn about your strategic objectives to help architect our relationship moving forward.

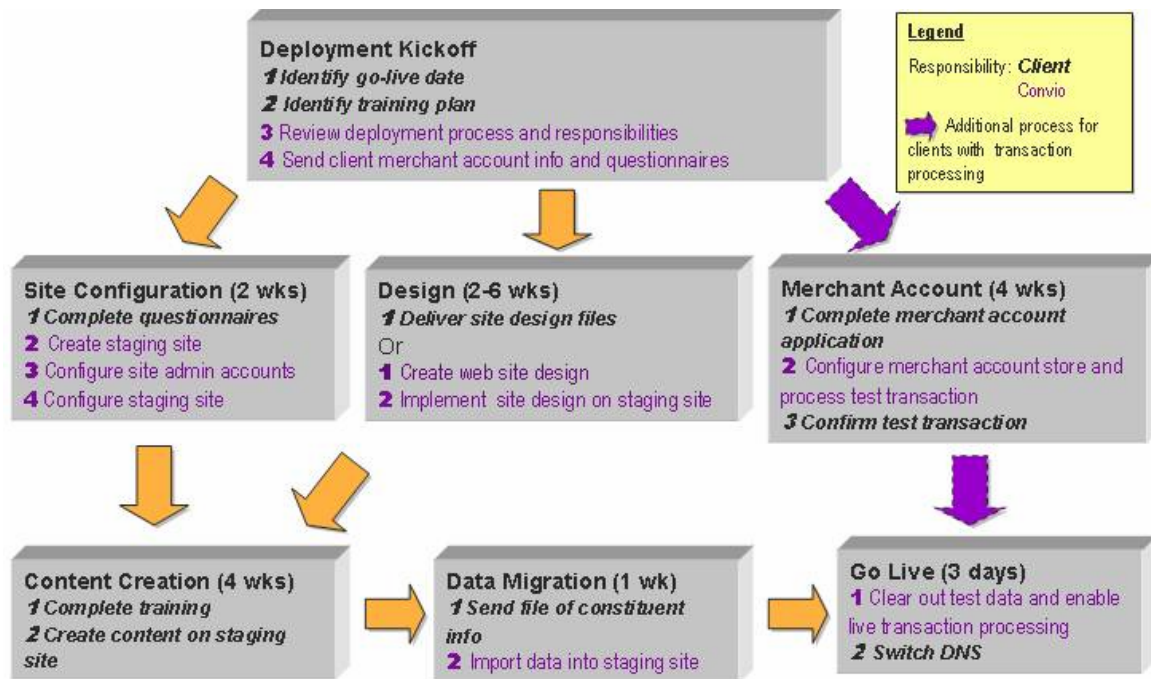


Figure 1. Overview of the deployment process

Your AM also will work with you to develop a training plan on Convio applications to maximize your organization's investment.

The orientation call will be followed with regular conference calls to discuss in detail decisions and activities that you will need to be involved in for a successful deployment, and to clarify any scheduling issues.

If the AM determines that you are ready to continue the deployment process (see *Preparing for Your Deployment*), the AM will engage a Project Manager (PM) to manage the deployment process, and the PM will contact you to arrange a deployment kick-off call. Your AM will continue to touch-base with you periodically during your deployment.

Project Manager

The PM will be your primary point of contact during deployment. The PM's role is to manage your deployment — gathering your site requirements and setting up your Convio solution. Your PM is responsible for understanding all of your requirements and providing solutions for your business needs using Convio software. Your PM will manage the entire implementation process, including scope management, performance reporting and the project schedule. He or she will provide you with a deployment schedule for review during weekly scheduled status calls and help you understand how to work through remaining tasks to complete your project. Your PM will work closely with you and your Account Manager to ensure we meet your deployment goals and objectives until the implementation phase is complete and your Web site is launched.

Week	Key Activities
Week 0	<ul style="list-style-type: none"> • Convio Project Manager assigned
Week 1	<ul style="list-style-type: none"> • Deployment kick-off call • Design kick-off call*
Week 2	<ul style="list-style-type: none"> • On-site/online training • In-person meeting to review questionnaires and deployment questions • Gather merchant account application information*
Week 3	<ul style="list-style-type: none"> • Questionnaires completed • Merchant account or IATS application submitted* • Content creation begins
Week 4	<ul style="list-style-type: none"> • Site configuration • Page wrapper implementation/design finalized • Content creation continues
Week 5	<ul style="list-style-type: none"> • Merchant account configured for Convio* • Content creation continues
Week 6	<ul style="list-style-type: none"> • Test transactions confirmed* • Content creation continues
Week 7	<ul style="list-style-type: none"> • Test site and make final configuration/content changes • Data migration
Week 8	<ul style="list-style-type: none"> • Test data cleared • DNS switch to point to Convio • Site goes live

(* if applicable)

Figure 2. Steps for a typical Convio deployment

In the kick-off call, your PM will:

- Review a slide presentation with your designated Convio administrator(s) or other technical contacts that details exactly what your organization needs to do over the next eight weeks
- Discuss your time constraints, staffing availability, and planned organizational activities to determine a go-live date for your new Web site

After the call, the PM will email you the following documents:

- Deployment questionnaire
- Merchant account information/application (if you will be processing financial transactions using Convio Fundraising or TeamRaiser)
- DataSync questionnaire (if you will be deploying Convio DataSync)
- A design questionnaire if Convio will design your site, or design guidelines to pass on to a Web designer if you will be using a Web design firm or an in-house design resource

- Other questionnaires specific to implementing the Convio applications you license

You will need to complete the questionnaires and set up your merchant account as quickly as possible to prevent delays in your deployment schedule. *We ask that you complete all materials within two weeks of receipt from Convio.*

Site Configuration and Staging Site Goes Live

Based on the information you provide in the deployment questionnaire and in the kick-off call with your Project Manager, your PM will configure your staging (“work in progress”) Web site. This process of site configuration includes:

- Creating user accounts for your staff members who need access to Convio, and defining permissions for each user (such as who can create content, who can approve content, etc.)
- Establishing default contact email addresses for your site, and a default “from” email address that will appear in all emails sent through Convio
- Writing email auto-responder copy
- Creating domains and subdomains for your Web site
- Enabling or disabling the use of cookies
- Designing one email stationary template
- Creating interest groups and categories

Once you have been trained on how to use Convio, you can begin using this staging site to build Web pages, add content (copy, images and documents) and set up campaigns. By working with the staging site, you will gain familiarity with the Convio administrative interface. Convio Customer Support will be available to you once your staging site is live to provide assistance with product-related and “how-to” questions. The staging site will not be “live” (visible to the public) until the DNS entry is changed (see *Go-Live* below).

The Site Design Process

Your new Convio Web site needs a design. Specifically, it needs what Convio calls the “page wrapper” — the static graphical elements that surround the main body of the Web pages on your site (called the “content area”). At a minimum, the wrapper typically includes:

- Your organization’s name, logo and slogan
- Primary and secondary site navigation buttons
- A facility for a user to login or logout
- Links to “tell a friend” about your site
- Some kind of picture/image
- A standardized footer

Design Best Practice Tip

Make it easy for Web site visitors to register for e-mail and future communications using Convio’s registration tools.

You must select one of three options for developing the page wrapper:

1. *Your project manager can mimic an existing site design that you specify.* If you already have a site design that you like, Convio can replicate it closely, if not precisely. It would be helpful if you provide the design files for your site in a layered PhotoShop file, or as HTML files with associated images.
2. *Your own design, or that of a third party.* If you have internal design resources, or if you work with an outside design firm, you can provide all the necessary design files to Convio (again, preferably in PhotoShop). Convio will send your designer a document that details the specifications for Convio page wrappers.



Figure 3. Page wrapper versus content area

3. A member of Convio's Graphic Design team can develop an entirely new design for you. Based on input you provide through a design questionnaire, a Graphic Designer will work with you to develop a concept. The process is started by a call with Convio's Graphic Designer. In this call, requirements and examples will be discussed. Convio's designer will typically design three options (called "comps") for your review. After giving you some time to review the comps, a conference call will be set up to gather feedback. Convio's Designer will either modify the designs or produce new designs based on your feedback. There is an additional cost for Convio's design services.

Merchant Account / IATS Setup

A merchant account — or an IATS account, an alternative form of merchant account Convio offers — enables your organization to process credit card transactions from online donations, ecommerce sales, and ticket sales. These funds will flow through your merchant account, and will then be deposited into your organization's bank account by the merchant account provider.

Merchant/IATS Accounts

If your organization will license Convio Fundraising or TeamRaiser, you *will* need a merchant or IATS account.

If you are only licensing Convio Advocacy or Email Marketing, you *will not* need a merchant or IATS account.

Convio works with two preferred providers, in addition to IATS. In the deployment kick-off call with your Project Manager, the best option for you will be discussed. While it is strongly recommended that you work with one of these providers, you may instead choose to select another. Doing so, however, may incur additional fees from Convio and potentially delay your deployment.

To set up a merchant account, you will need to complete an application with the provider. Please keep in mind that the application process can take as little as a few days or as long as two weeks. It is therefore imperative that you begin the application process as early as possible so as not to delay your deployment. Your site cannot be deployed without a merchant account configured.

Once your merchant or IATS account is established, you will need to provide us with some specific information so that we can configure your site to route funds correctly to the provider. The

transaction process will be verified by running a test transaction through the system. A successful transaction will result in the deposit of the funds into your bank account. Once this deposit is confirmed, online transaction processing will be enabled.

	Merchant Account	IATS Option
Fill out application	1 week	2 days
Application process	1-2 weeks	2-3 days
Configuration of account and test transactions	1 week	2 days
Confirmation of transaction deposited to your bank account	1 week	Thursday of the following week
<i>Total duration</i>	4-5 weeks	2-3 weeks

Table 1. Typical merchant account and IATS set-up timelines

Content Creation/Porting

Your new Web site will need content — the text and graphical elements that introduce your organization to site visitors, explain your initiatives, and so forth. Before you can begin adding content to your site, you must complete the What You See is What You Get (WYSIWYG) and PageBuilder training courses. The WYSIWYG course is offered online, “on demand” — you can take this one hour class at any time. The 90-minute PageBuilder course also is online, but is instructor-led and therefore must be scheduled.

You probably have most, if not all, of your content written and posted on your current Web site. Convio’s PageBuilder application — included with all Convio solutions — is based on a WYSIWYG editor. This means that you can start adding content by simply copying text from your current site and pasting it into Convio’s editor. You will then need to tweak its formatting, add personalization and conditionalize elements (such as the ability to refer to the site visitor by his or her name, or to display different text depending on what the visitor is interested in), add links, and test the page in different browsers. The entire process can take up to 30 minutes per page.

If you already have a large number of Web pages, a good option is to use Convio’s Content Porting services. Using a combination of automated tools and manual work, a member of Convio’s Deployment Services staff can “scrape” HTML and image content from your current site, format it appropriately for your new site, re-create links, and perform testing. Content Porting services will save you time, free up resources, and help ensure a smoother deployment.

The content creation process may also include building donation forms, designing surveys, setting up an events calendar, building an online store, creating advocacy action alerts, and more, depending on what Convio solutions you license and how much you want to do with them initially. You may use Virtual Administrator to perform these services, as well.

Data Synchronization/Data Migration

You will get the most out of Convio if you link constituent information you have captured previously — whether online or offline — to Constituent360™, Convio’s online marketing database. This database builds and stores profiles of your constituents based on their online interactions with your organization, and enables you to target and tailor online communications to the constituents who, based on their profile information, will be the most receptive.

There are two ways to get information about your existing constituents into Convio. One way is to perform a data migration. This essentially is just an upload into Convio of basic information about your constituent base that you plan to leverage online. For example, you may have a database of constituent records in a software tool such as Microsoft Access or Excel, or a donor database. At

a minimum, you will want to upload those constituents' names and email addresses. You would not necessarily upload all of the information you have collected, however. For instance, Convio does not store constituents' credit card numbers for security reasons.

Data migration is a one-time process. It is a straightforward, relatively quick way to populate Convio with a baseline of constituent information. Most organizations, however, wish to maintain a separate database in parallel to Convio for offline functions, and thus need to ensure that any information added, changed, or deleted in the offline database is reflected in Constituent360. For example, if a constituent calls your office to change her mailing address, you may enter this into your donor database, but you would want that change reflected in Convio, too. Likewise, if that constituent updates her address online using Convio, you would want that to be reflected in your offline databases.

To enable the bi-directional synchronization of data between your offline and online databases, Convio offers DataSync. Once configured to match fields in your databases, DataSync provides a utility to allow you to synchronize the data, either on demand or at scheduled times.

For more information about DataSync

Ask your Account Executive or Account Manager for a copy of our DataSync FAQ (Frequently Asked Questions) document.

Convio has successfully configured DataSync with dozens of popular offline databases, such as Blackbaud's Raiser Edge® and Target Software's Team Approach®. But because every database is configured differently, a Convio Integration Consultant will need to work with your organization to configure the synchronization correctly. This will require some work on your part. To assist in this effort, you should designate two "owners:"

- A technical contact who has a thorough understanding of your database software, including its import/export capabilities, and
- A functional contact who will help identify the data that should be exchanged between the two systems in order to achieve business objectives

Your Project Manager will send you a DataSync questionnaire to gather basic information on your database setup and the above individuals' contact information. The Integration Consultant will review the completed questionnaire, and follow-up with a project plan with further details and a separate kick-off call. We will work with your staff to establish the technical requirements, develop and test the data synchronization, document the process, and train your database administrator.

Note that whomever will execute the data synchronization regularly should take the Advanced Constituent360 training course prior to working with Convio to set up data synchronization. This is an online course.

Go-Live

Your site will be ready to go live when the steps described in detail above have been taken. In summary, these include:

- Your site is configured
- Your site design is final and in place on your staging site
- Your merchant or IATS account has been created and tested
- Your site content has been created or ported
- Everything has been thoroughly tested

The final step before the “switch can be flipped” and your site goes live is to change your DNS (domain name server) settings. Simply put, this means that when someone types *www.YourOrganization.org* into her Web browser, the Internet will now “know” to look for that site on a Convio server, not at the place where your current site is hosted. Note that some clients host portions of their site on servers outside of Convio; accommodating this will not be a problem.

Convio will provide you with instructions on pointing your DNS to our servers one week prior to your Web site go-live date. This is a technical issue that will be handled by your Webmaster or someone at a Web hosting facility, if you use one.

Summary of Your Tasks

Deploying Convio software is a collaborative effort between Convio and your organization. The key tasks Convio needs you to invest time and effort on are summarized in the following table.

Task Description	Average Effort
Participate in status calls throughout deployment process	10 hours
Complete deployment questionnaires	4 hours
Receive training on Convio solutions. At least one member of your organization must attend three days of “basic training” in Austin on using Convio software.	3 days
Content population/porting	Up to 30 mins/page
Merchant account or IATS application process and testing	Up to 8 hours
Deliver constituent information in a comma separated value (CSV) file for data migration	6 hours
Deliver design files to Convio, or send Convio the URL for the site design to mimic	varies
New creative design for page wrapper (if purchased), including requirements gathering, mutual review process, etc.	10 hours
Testing site before go live	8 hours
Point your DNS (Domain Name Server) to Convio	4 hours
DataSync setup on your end (if licensed)	40 hours

Table 2. Summary of your tasks during deployment

Preparing for Your Deployment

It would not be fair to you — or to us — to begin your deployment before you have reached a few key milestones. You should consider your organization ready to deploy Convio when all of the following have been completed:

- You have made a commitment to make the deployment process a priority for your organization for the next eight weeks
- You have designated a Project Lead to manage the deployment process on your end
- You have designated one or more Convio administrators, and they are registered for training. (This may be the same person as your Project Lead.)
- If you purchased Convio DataSync, a Database Manager has been identified and is registered for Constituent360 and Convio Basic training
- You have finalized the branding, logos, color schemes, and other basic design elements for your new Convio-powered Web site
- Your written Web content is at least 90% complete
- If you are using a third party Web designer, the design of your page wrapper is underway

Of these checklist items, the first is most important. Deploying Convio will require your hands-on involvement to be successful. The timelines outlined above are governed by the project plan on which we will mutually agree. If key milestones are missed, the go-live date will be delayed.

We know that unexpected things happen. All we ask is that you remain committed to your deployment, trust our process, and let us know immediately if you foresee any problems. We will do our best to work through any issues.

Getting Help and Learning More

Convio software is designed to be as easy and intuitive to use as possible. Even so, with its myriad features, you may get stuck once in a while. Moreover, once you become proficient using the more basic functionality of Convio, you will want to begin learning about the more advanced capabilities. When you become a Convio client, we make a commitment to support you in these efforts.

Training

The best way to become proficient in using Convio software is to participate in our training programs. Included in your deployment fees is basic training (“Convio Basic”). This three-day course in Austin, Texas introduces your designated Convio Administrator(s) to the core modules of the Convio software suite. The course begins with foundation concepts and then progresses into individual module training, guiding you through interactive, hands-on exercises throughout the sessions.

Supplementing Convio Basic is a wide array of training courses on specific aspects of Convio functionality. These courses are more in-depth courses and cover advanced functionality. They also are useful for additional administrators who may use only specific aspects of functionality.

While some courses are offered “live” in Austin, most courses (with the exception of Convio Basic) also can be taken online. Interactive online courses are led by a Convio instructor at scheduled times, or pre-recorded courses can be taken on-demand at a time convenient for you. All you need is a Web browser and a telephone to participate. Best of all, you do not need to leave your office.

Online System Help

Context-sensitive help can be accessed on every administrative screen in Convio. Pressing the help symbol on any screen will display useful information about whatever task you are currently working on. System help includes step-by-step instructions for accomplishing tasks using Convio, including screen shots and a glossary of terms.

Convio Customer Support Desk

If online system help does not address your need, access Convio Customer Support Desk (CSD). CSD is a special Web site reserved for Convio clients. You will find continuously-updated Frequently Asked Question (FAQ) documents, as well as a Knowledge Base. These resources may point you to a previously-encountered solution to the problem you are trying to solve.

Customer Support

Whether you have a quick “how-to” question or a more serious technical problem with your Web site, Convio’s Customer Support organization is here to help. There are two ways to access Customer Support:

- The Convio Customer Support team is available through a toll-free phone number Monday through Friday from 7 am to 7 pm Central time. Convio provides after-hours support for emergencies 24 hours a day, 7 days a week.
- From your desktop, you also can access customer support through a Web interface, called Convio Support Desk (CSD). The benefits of logging your requests through the CSD include the ability to track and update the progress of your request, and an up-to-date history of all of your requests. When you submit a help ticket, you will receive confirmation of the submission and will be given a tracking number. You can return at any time to check the status or update the content of your case online.

Customer Support uses a tiered support structure to ensure that you receive the best response to your requests as quickly as possible. Our Support Analysts serve as your first point of contact for all incoming support requests. They collect the information needed to initiate the support process. From there, they will respond personally to your request or forward your request to the appropriate Support Engineer, or other Convio personnel if necessary.

Best Practices to Ensure Success

From our work with hundreds of nonprofit organizations, we have assembled a list of best practices which, if followed, tend to ensure the highest level of success using Convio. A few of these are highlighted here:

Pre-Deployment

- *Start with an online strategy.* Before your deployment, develop a *written* plan that outlines your overall organizational goals and how you intend to use the Internet to support those goals. Prioritize your various online activities and build a calendar that denotes when (approximately) you intend to launch various initiatives. View this plan as a living document, and use it frequently as a reference to ensure that you are doing the right things, at the right time.

During Deployment

- *Stay on schedule.* Your designated Project Manager (PM) will do his or her best to tell you ahead of time exactly what you need to do each week, what information he or she needs, and when. Do not delay in starting more involved tasks, such as applying for a merchant account.
- *Don't sweat the details.* While your initial Convio-powered Web site is under development, you should focus your attention on the overall usability of your site. Minor formatting quirks, for instance, can be easily corrected at any time — it is much harder to change a site's overall navigation scheme once implemented.
- *Understand "draft" versus "final."* Your PM will clearly articulate which design elements are at draft level (in continuous development) and which are final (locked in until after your deployment). To keep your deployment on schedule, it is important to be clear on this distinction.
- *Use one of Convio's recommended merchant account providers, or IATS to avoid delays and additional costs.*

Post Deployment

- *Follow the "walk, jog, run" model.* Our clients are most successful when they resist the temptation to do too much too quickly. Begin your experience using Convio software by trying out some of the simpler features (walk). Once you have mastered those, try more advanced features (jog, then run).
- *Give yourself enough time to do the job right.* Many clients underestimate the time it takes to execute a campaign. While it may only take minutes to use Convio software to accomplish a specific task — such as define an email campaign — the majority of time will be spent doing preparatory work, such as writing and editing the copy, determining the appropriate targets for the campaign, and determining what level of personalization is required. Planning takes far more time than using our tools but the investment will be critical to the success of everything you do online.
- *Test all emails before sending.* Before launching a major email campaign, be sure to test all email messages for (a) multiple email clients, (b) HTML versus text-only versions, (c) the likelihood of the message being caught by a spam filter, and (d) for correct links back to pages on your Web site. These are not difficult tests to perform, but they do take some time. Give yourself a day or two to test every permutation.

Beyond Your Deployment

The foundation of our company rests on the success of our clients. Therefore, Convio keeps lines of communication open with you indefinitely after your deployment. Your Account Manager will stay in frequent contact with you to ensure your satisfaction using Convio, and Convio Customer Support analysts will be there to help you with product questions. In addition to these resources, Convio also provides:

Convio Coach — An email newsletter written by Convio’s Client Education Manager that highlights pertinent articles from *Convio Connection* (Convio’s email newsletter for prospects, clients, partners and other groups), as well as how-to articles, tips on using Convio software, and updates on available training courses.

Ongoing training — As new products or new product features are released, Convio adds online and classroom training programs. Courses on existing functionality are continuously offered, as well, to refresh your skills or to introduce Convio technology to new staff members.

Customer communiqué — Emails sent out several times per year from our CEO about our company, important new product updates, and regulatory, political, and other issues that affect our clients.

Product upgrade notices — Before new products, new features, or other product upgrades are released, Convio’s Customer Support team will proactively inform your organization about what changes to expect.

Convio user groups — To maximize your use of Convio software, Convio has helped establish local user groups throughout the country to facilitate the sharing of best practices, tips and tricks among our client community. These forums are ideal for exchanging ideas with other nonprofit organizations and higher educational institutions about what works well online.

The screenshot displays the Convio Customer Center website. At the top, there is a navigation bar with links for Home, Training, Deployment, Products, and Best Practices, along with a search box. The main content area is divided into several sections:

- Exciting Changes to Fundraising:** A central announcement box stating that the site has been upgraded to Convio's latest 4.3.x release. It includes links for "4.3.6 Upgrade Training" and "Release Notes", and a link to "Check the class schedule".
- Contacting Support:** A sidebar box providing contact information for the Support Web Site (support.convio.com), Knowledge Base, and online ticketing. It also lists the Call Center phone number (888-528-9501) and hours (Option 3 Mon-Fri, 7:00AM - 7:00PM Central Std Time).
- Convio Coach:** A sidebar box with an icon of a telephone and a headset, encouraging users to "Read the latest issue" of the newsletter for tips, tricks, and best practices.
- Upcoming Training:** A box announcing "No Classes - Get Ready for Convio5!" for the period of Tuesday, March 28, 2006, to Friday, April 14, 2006. It includes a link to "Download your training materials now" and a link to "See more on-demand and scheduled training classes".
- New to Convio?:** A box for first-time users, offering guides for "Deployment Setup Process", "Everything About Merchant Accounts", and "Data Return Policy (PDF)".
- Convio News:** A sidebar box listing recent news items, such as "Vinay Bhagat Named 2006 Fundraising Professional of the Year" and "National Multiple Sclerosis Society Chooses Convio".
- Featured Best Practices:** A partially visible box at the bottom of the page.

Figure 4. Convio Customer Center

Conclusion

Convio's deployment process is a time-tested approach to positioning your organization for success online. We have evolved this process over several years and through hundreds of successful deployments.

Deploying Convio solutions is a joint effort that will require involvement on your part. Just remember:

- Make your deployment an organizational priority
- Stick to the schedule
- Communicate openly with your Convio Project Manager
- Trust the process

We look forward to working with you!



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