

Welcome



Clients, Partners and Invited Guests,

Welcome to our third annual Convio Summit. The entire Convio team is excited to have you join us.

We all have a lot to talk about over the next couple of days. You're going to hear success stories straight from Convio clients, meet and share ideas with Convio employees and partners, and get the most recent developments from industry leaders. At the same time, we'll share with you the latest Convio product and services news, including information about our groundbreaking Common Ground™ CRM system.

The Summit has come a long way in the short time since we launched it in 2006. It's a nonprofit sector event where leaders in the sector showcase the latest nonprofit technology trends and successes, where experts come together to share ideas, and where nonprofit organizations come to build a community that lives for years to come. It's not just a Convio event. It's *your* event.

We value your participation in the Summit, so I ask that you bring as much of yourself to the next two days as possible. Strike up some conversations with each other. Swap ideas. Flag down a Convio employee and let us know how we can help you.

We have a deep commitment to your needs and the issues most important to this sector. My sincere hope is that each of you takes away something from this event that gives you a new and better way to help your organization reach its full potential.

I look forward to seeing each of you over the next two days.

Regards,

A handwritten signature in black ink, appearing to read "Gene Austin".

Gene Austin
Chief Executive Officer, Convio

Greener Days

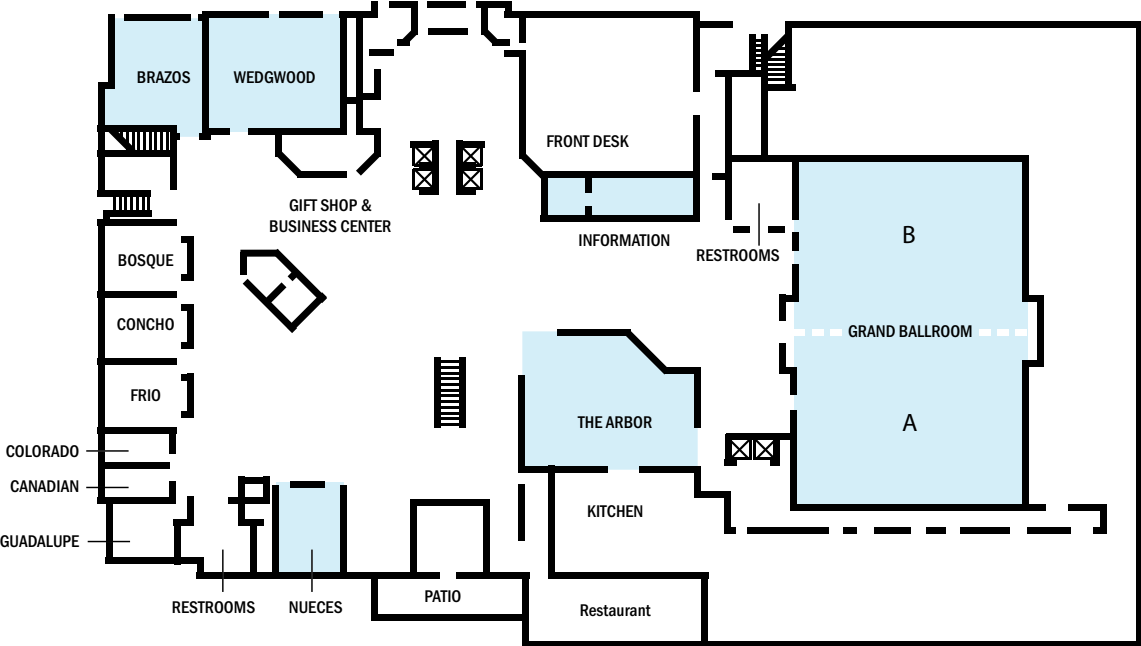
You may have noticed a few changes at this year's conference... We're taking some steps to reduce waste:

- Your conference bag is made of 98% recycled material.
- Your Convio logo pen is made of 80% recycled material.
- Your Summit name badge is made of 50% recycled material.
- We've reduced the amount of paper products consumed by offering you copies of the breakout session presentations in different ways:
 - Your conference bag includes a CD with PDF files of each breakout session presentation.
 - You can also find PDF files of each breakout session on the Customer Center website after the conference.
 - Since we are not providing paper copies of breakout session presentations, we've included pages in this program for you to take notes.
- We've provided you with a reusable water bottle for use throughout the conference and beyond.

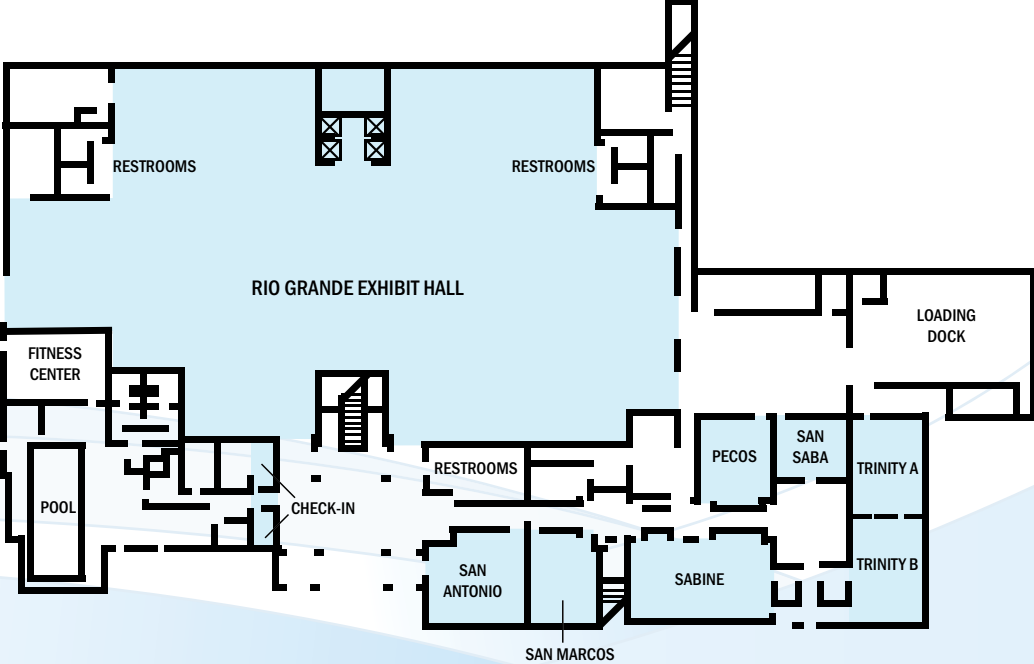


Conference Map

Atrium Level (upper level)



Plaza Level (lower level)



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www.northridgeinteractive.com/servingnonprofits.aspx

exhibit table #18

ThePort

www.theport.com

exhibit table #22

Salesforce.com
foundation

www.salesforce.com/foundation

exhibit table #7

TERPSYS

www.terpsys.com

exhibit table #3

Watershed
COMPANY
ONLINE FUNDRAISING & ADVOCACY

www.watershedcompany.com

Mobile Commons

www.mcommons.com

exhibit table #6

NFP
Technologies

www.nfpotech.com

exhibit table #8

N TEN

Nonprofit Technology Network

www.nten.org

exhibit table #2



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RIGHT MESSAGE, RIGHT AUDIENCE, RIGHT TIME

www.r3strat.com

Target Software
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TRINET
Internet solutions, Inc.

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exhibit table #9

You Tube

Broadcast Yourself™

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exhibit table #21

Schedule at a Glance

Monday, November 17

4:00 - 7:00pm	Check-in and Information Desks open
5:30 - 7:30pm	Welcome Networking Reception with cocktails and hors d'oeuvres (Rio Grande)

Tuesday, November 18

7:30 - 8:30am	Breakfast (Rio Grande)
7:30am - 5:30pm	Check-in and Information Desks open
9:30am - 5:30pm	Open: <ul style="list-style-type: none">• Client Lounge (Nueces)• Expert Lab (Wedgwood)• Demos (Brazos)• Exhibit Hall with all-day coffee service (The Arbor)
8:45 - 10:00am	General Session with keynote speaker Tony Elischer (Grand Ballroom)
10:00 - 10:15am	Break
10:15 - 11:15am	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• Constituent360™: Tips and Tricks for Using Data to Understand Your Contacts• Your (Facebook) Application Has Been Accepted• Growing Your Web Traffic – Now More Important Than Ever• Pack a Stronger Punch with Multi-Channel Marketing• Migration Nuts and Bolts Workshop
11:15 - 11:30am	Break
11:30am - 12:30pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• The ABCs of Convio APIs• Everything That's New and Cool from Convio• Web Analytics – Driving Decisions with Data• "Opt Me In!" – Growing, Improving, and Cleaning Your Email List• Migration Open House
12:30 - 2:00pm	Networking Lunch with optional Birds of a Feather discussion tables (Rio Grande)
2:00 - 3:00pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• Advanced Techniques in Convio CMS (and GetActive WSM)• Mobile Activism: "I'd Like That To Go"• Ready, Set, Go! Proven Strategies for Small and Medium Sized Organizations• From Concept to Finish Line – Getting Results with TeamRaiser™• Migration Roadmap
3:00 - 3:30pm	Networking break with snack
3:30 - 4:30pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• Data Stewardship 101: Proven Practices for Maintaining Data Quality on Your Convio Website• From National Parks to Legal Precedents: How Online Databases Can Strengthen Constituent Engagement• Online Advocacy 2.0: Moving Beyond Petitions• Building a Top-Notch Web User Experience

Schedule at a Glance

Tuesday (continued)

5:30 - 7:00pm	Networking Reception with cocktails (Rio Grande)
7:00pm - midnight	Buses provided to and from downtown Austin (Front of hotel)

Wednesday, November 19

7:30 - 8:30am	Breakfast (Rio Grande)
7:30am - 4:30pm	Check-in and Information Desks open
9:30am - 4:30pm	Open: <ul style="list-style-type: none">• Client Lounge (Nueces)• Expert Lab (Wedgwood)• Demos (Brazos)• Exhibit Hall with all-day coffee service (The Arbor)
8:45 - 9:45am	General Session (Grand Ballroom)
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11:00 - 11:15am	Break
11:15am - 12:15pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• TeamRaiser™ — You’ve Come a Long Way, Baby!• Power of the People II: The True Untold Story of the Constituent Empowerment Suite• How Do They Do That? — The Latest Research on Staffing for Online Success• The 7 Habits of Highly Successful Forms• Migration Open House (<i>repeat session from Nov 18</i>)
12:15 - 1:15pm	Grab-n-Go Boxed Lunch (Rio Grande) Optional Lunch with YouTube (Rio Grande)
1:15 - 2:15pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• Engagement Pathways 102: Implementation Methods for Maximizing Constituent Value• Hot Topics in Email Delivery: Lower Your Spam Complaint Rate and Email List Churn• Advanced Online Fundraising Techniques• Engaging the “Wired Wealthy”
2:15 - 2:30pm	Break
2:30 - 3:30pm	Breakout Sessions (see pages 8-18) <ul style="list-style-type: none">• Applying Advocacy Best Practices on the Convio Platform• Walk, Run, or Ride — Take Your Event or Event Series to the Next Level• Doing More with the Same: Using Reporting and Testing to Get Better Results• Understanding Your Audience: New Tactics for Deep Listening

Sessions

General Sessions

Tuesday, November 18 | 8:45 – 10:00am | Grand Ballroom

Keynote Speaker: Tony Elischer

Tony Elischer, managing director of THINK Consulting Solutions in the UK, is an internationally recognized expert with 25 years of experience in the nonprofit sector covering fundraising, marketing and creativity. Tony regularly speaks at fundraising conferences around the world. At this general session, you'll learn fresh ideas for your marketing and fundraising programs, and have fun along the way.

Wednesday, November 19 | 8:45 – 9:45am | Grand Ballroom

Join Gene Austin, Convio CEO, and Vinay Bhagat, Convio Founder and Chief Strategy Officer, as they talk about trends in the nonprofit sector. They'll also present the 2008 Innovator Awards, recognizing clients' creative use of Convio's online marketing and web content management solutions.

Breakout Sessions

Breakout sessions are organized by track to help you understand the intended audience. But, please feel free to build your own track by mixing and matching sessions that meet your specific interests and needs.



Track 1 – Power Administrator

Convio administrators: Are you ready to dive more deeply into specific product administration topics? Then, this track is for you. The sessions are “how-to” classes that are ideal for day-to-day users of Convio who are ready to move beyond Convio basic product training.



Track 2 – Product Enthusiast

If you're interested in detailed information about the newest and upcoming Convio product features and offerings, then this track is for you. It's ideal for Convio administrators wanting to know about new and upcoming product features, as well as executives and managers wanting to know if a particular Convio product is right for their organization.



Track 3a & 3b – Online Strategist

Executives and managers: Get ready to be inspired while learning more about using the Internet more strategically for your organization. The sessions in this track will focus on fresh strategies, proven practices, and real-life examples for maximizing the online channel for fundraising, marketing and advocacy results. Note that you'll have a choice between two concurrent sessions (a and b) at each time in this track.



Track 4 – Getting Active with Convio

The sessions in this track are designed specifically for clients on the GetActive platform who will be migrating to the Convio platform. These are the sessions to attend if you need to get your migration questions answered. Note that some sessions are offered twice.

Tuesday, November 18

Day 1 Breakout Sessions: 10:15 – 11:15am

Track 1 | Room: Trinity



Constituent360™: Tips and Tricks for Using Data to Understand Your Contacts

You know that your Convio Constituent360 online database contains vast amounts of useful information, but are you using it to its fullest? Explore techniques and tools for studying and segmenting your constituents in new ways to help inform your online recruitment, engagement, and retention practices.

Presenters:

- Mathew Grimm, Online Analytics and Research Manager, Environmental Defense Fund
- Kevin Suer, Senior Product Manager, Convio

Track 2 | Room: Sabine



Your (Facebook) Application Has Been Accepted: Stories from the Social Networking Front Lines

Social networking sounds fun, but why should you care about it? In this session, you'll learn from organizations that have successfully launched a Facebook application using the Convio platform. They'll tell you how they planned and implemented their application, and share their tips for making an application take off in Facebook.

Presenters:

- Andrew Betts, Marketing Director, Outreach International
- Adrian Cotter, Senior Webmaster, Sierra Club National
- Ayumi Stubbs, Director of Internet Communications, ASPCA
- James Young, Senior Product Marketing Manager, Convio

Track 3a | Room: Ballroom A



Growing Your Web Traffic – Now More Important Than Ever

By now, you've likely read surveys and studies showing that even consumers who don't buy online use the Internet to research purchases and charities. That means that driving traffic to your website is critical to your organization's ongoing success. In this session, you'll hear the top ideas for driving traffic to your website, including: search engine marketing, content syndication, online media such as banner advertising, RSS feeds, email marketing, viral marketing, and rich media.

Presenters:

- Phoebe Lee, Online Communications Coordinator, United Nations Foundation
- Stephen O'Keefe, Senior Project Manager, Convio
- Eric Radin, Director of Nonprofit Services, Care2

Track 3b | Room: Ballroom B



Pack a Stronger Punch with Multi-Channel Marketing

Over the last few years as we've studied the impact that marketing channels have on each other, we've seen that when combined, face-to-face, traditional direct response, events, and online efforts have a greater impact than when used alone. In this session, you'll find out how nonprofits are synchronizing their online communications with mail, phone, TV, and new social media opportunities to maximize impact. You'll leave this session with at least three ideas to improve your own multi-channel marketing program.

Presenters:

- Vinay Bhagat, Chief Strategy Officer, Convio
- Jeff Brooks, Creative Director, Merkle Domain
- Jeff Regen, Vice President of Online Marketing, Defenders of Wildlife
- Olga Woltman, Director of Interactive Services, Adams, Hussey & Associates

Sessions – Day 1

Track 4 | Room: San Antonio



Migration Nuts and Bolts Workshop

The Getting Active with Convio Migration Program has been operating smoothly for more than a year. So, what are you waiting for? Take advantage of the benefits of the Convio platform and plan your migration. This workshop will review the migration process – what happens when you migrate, how to prepare, what we'll take care of for you, and what work you'll need to do. If you're considering migration in the next year, this is for you!

Presenters:

- Betsy Gressler, Director of Account Services, Convio
- Sally Heaven, Senior Account Manager, Convio

Day 1 Breakout Sessions: 11:30am – 12:30pm

Track 1 | Room: Trinity



The ABCs of Convio APIs

Break free, and mashup your custom code with Convio! Discover examples of custom donation forms, registration pages and more. You're not a programmer? No problem! If you're familiar with APIs and how they can be used, and want to learn more about what Convio Open has to offer, join us for this interactive show-and-tell and Q&A session on Convio APIs. We'll discuss what you can and can't do, and look at examples of projects from Convio clients and partners.

Presenters:

- Mark Becker, Founding Partner, Cathexis Partners
- Bruce Keilin, Principal Consultant, Convio
- Tompkins Spann, Senior Market Strategist, Convio

Track 2 | Room: Sabine



Everything That's New and Cool from Convio

Convio's product development team has been hard at work building products and features to help you raise more funds and operate more efficiently. In this session, you'll learn about major initiatives including Common Ground™, our CRM system that moves beyond traditional donor management; MultiCenter, for effectively managing affiliated organizations; and the evolution of Convio Open for integration and interoperability on the web. You'll also hear about product partnerships, including mobile messaging and social networking, and enhancements you can use today for applications including Advocacy, Fundraising, TeamRaiser™, Events and Reporting.

Presenter: Tom Krackeler, Vice President, Product Management, Convio

Track 3a | Room: Ballroom A



Web Analytics – Driving Decisions with Data

This is the year of analytics for Convio and for nonprofits. In fact, we've seen more interest in web analytics this year than ever before! In this session, you'll learn about some of the most important information you can derive from your analytics system, and how you can use that information to drive campaigns and design decisions on your site.

Presenters:

- Andrew Magnuson, Interactive Consultant, Convio
- Brandy Reppy, Senior Interactive Specialist, Convio

Track 3b | Room: Ballroom B



“Opt Me In!” – Growing, Improving, and Cleaning Your Email List

A high quality email list is vital to achieving fundraising and advocacy results. In this session, you'll hear the premiere tactics in email list building, including email appending, advocacy list building, list churn, usable file, and optimal email delivery. You'll also learn the five top strategies you should implement immediately to build the best email file.

Presenters:

- Rita Allen, Manager, Nonprofit Group, FreshAddress, Inc.
- Bill Pease, Chief Scientist, Convio

Track 4 | Room: San Antonio



Migration Open House

Join us for this migration open house, and find out everything you've ever wanted to know about migration but were afraid to ask. This information-packed discussion about migrating from GetActive to Convio is an open forum without a formal presentation. You can ask experts all your product and service questions, and get advice and information from account managers, project managers, and others. No slides, just answers.

Presenters:

- Van Do, Senior Account Manager, Convio
- Betsy Gressler, Director of Account Services, Convio
- Stephen O'Keefe, Senior Project Manager, Convio
- Katrina Schold, Principal Services Engineer, Convio

Day 1 Breakout Sessions: 2:00 – 3:00pm

Track 1 | Room: Trinity



Advanced Techniques in Convio CMS (and GetActive WSM)

Ready to sharpen your Convio CMS skills, and learn some new ones? In this session, we'll look at tips, tricks and the latest techniques for making your website work for your organization. We'll also go through a step-by-step approach to configuring a blog in CMS (or GetActive WSM). We'll end the session with an open Q&A period and an exchange of ideas. Whether you're using the Convio CMS platform, or you're a GetActive WSM client who hasn't yet migrated to Convio CMS — this session is ideal for you.

Presenters:

- Bruce Keilin, Principal Consultant, Convio
- Hilary Shore, Director, CMS Services, Convio

Track 2 | Room: Sabine



Mobile Activism: “I'd Like That To Go”

Did you know that nearly a billion text messages are sent every day in the U.S. alone? In this session, you'll learn about the mobile industry and how to integrate mobile activism into your overall marketing strategy. This panel will include industry experts discussing the benefits of mobile activism, the how-to of integration, and a Convio client who already has launched a campaign using text messaging.

Presenters:

- Myra Friel, Senior Product Manager, Convio
- Kristin Koch, Deputy Director of Communications for Online Strategies, NARAL Pro-Choice America
- Holly Ross, Executive Director, NTEN
- Matt Wilson, Director of Partnerships, Mobile Commons

Sessions – Day 1

Track 3a | Room: Ballroom A

Ready, Set, Go! Proven Strategies for Small and Medium Sized Organizations



If you've ever found yourself reluctant to invest more in Internet tools or strategies for fear of not having the right staff members or know-how to make them work, then this session is for you. You'll discover the Convio Go! program — a step-by-step one-year guided program designed to help novice or resource-constrained organizations like yours use the Internet to attract supporters and raise more funds. We'll step you through this structured program of software and services based on proven online techniques to get you going.

Presenters:

- Patrick Hansen, Senior Interactive Consultant, Convio
- Adam Lemmon, Interactive Specialist, Convio

Track 3b | Room: Ballroom B

From Concept to Finish Line — Getting Results with TeamRaiser™



Every aspect of your event — from concept to finish line — should reinforce your relationship with your constituents. Join us as Convio clients and partners share field knowledge to give you an edge for your TeamRaiser event-based fundraising. You'll leave this session with enough information to transform your fundraising events into events that turn participants into loyal year-round donors, increase awareness, generate more race revenue, and build a community to sustain your fundraising goals year after year.

Presenters:

- Mark Becker, Founding Partner, Cathexis Partners
- Nancy Daniel, Coach, Event360
- Lara Fermanis, Principal Consultant, Convio
- Marguerite Kirst Colstan, Director, Communications, Autism Society of America
- Norman Reiss, Manager, Online Services, Crohn's & Colitis Foundation of America
- David Smith, Executive Director, Hill Country Ride for AIDS
- Donna Wilkins, President, Charity Dynamics

Track 4 | Room: San Antonio

Migration Roadmap



Let's talk about letter to the editor, local advocacy data, and all those cool GetActive features you've been waiting for on the Convio platform. Join us for an update on the Convio roadmap specific for GetActive platform clients.

Presenter: Tom Krackeler, Vice President, Product Management, Convio

Day 1 Breakout Sessions: 3:30 – 4:30pm

Track 1 | Room: Trinity

Data Stewardship 101: Proven Practices for Maintaining Data Quality on Your Convio Website



Discover tools and techniques for maintaining a high level of data integrity on your Convio-powered website. From online data collection and resolving duplicates to data transfer between Convio and offline systems, we'll discuss ways to keep your most valuable asset — your data — in tip top shape. If you're concerned with the business use of your organization's data, then this session is for you!

Presenters:

- Bennett Donovan, Lead Integration Consultant, Convio
- Chris Ojeda, Senior Integration Consultant, Convio

Track 2 | Room: Sabine



From National Parks to Legal Precedents:

How Online Databases Can Strengthen Constituent Engagement

Premium content can make a big impact on your ability to engage and retain constituents. In this session, you'll learn how Convio clients are moving their content from traditional channels to interactive online libraries, databases and tools using Convio CMS features. Whether your organization is big or small, you'll learn how to offer up great web content.

Presenters:

- Felicia Carr, Director of Online Communications, National Parks Conservation Association
- Scott Williamson, Solutions Engineer, Convio

Track 3a | Room: Ballroom A



Online Advocacy 2.0: Moving Beyond Petitions

Online advocacy has come a long way since the days of form petitions and emailing Congress. Today, we're using mobile advocacy and social networking sites among a broader set of advocacy tools to reach decision-makers. In this session, you'll hear from peers who are using cutting-edge strategies to mobilize constituents, build housefiles, and influence decision-makers. You'll walk away with ideas that you can start using right away.

Presenters:

- Sally Heaven, Senior Account Manager, Convio
- Carie Lewis, Internet Marketing Manager, Humane Society of the United States
- Christopher Masak, Grassroots Specialist, e-Advocacy, American Cancer Society Cancer Action Network
- Marc Ruben, Vice President, eCampaigns, M+R Strategic Services

Track 3b | Room: Ballroom B



Building a Top-Notch Web User Experience

Do you have usability goals for your website? Do you know how to measure the success of your current "online constituent experience," and how to craft a plan to make your site increasingly successful? Do you have ambitious online conversion goals, but aren't sure how to take your website to that next level? In this session, you'll find out how to set usability goals for online success, including how to take your site's temperature, setting long-term optimization benchmarks, and creating your optimization plan. You'll discover recent usability studies that have driven high-impact changes in a website's design and information architecture, focusing on what you and your organization can start doing today.

Presenters:

- Lacey Kruger, Interactive Architect, Convio
- Misty McLaughlin, Manager of User Experience, Convio
- Michelle Shefter, Director of Online Publishing, Defenders of Wildlife

Sessions – Day 2

Wednesday, November 19

Day 2 Breakout Sessions: 10:00 – 11:00am

Track 1 | Room: Trinity



That Depends... Using “S” Tags for Conditional Content

Make the most of your Convio-driven Web site with conditional content! Convio’s powerful and extensive “Session” tags will help you tailor the user experience based on profile information, previous site interactions and more. “S” tags are easily implemented by non-programmers yet deeply-capable for the savvy administrator. We’ll discuss the structure and implementation of hand-written conditional code so you can personally engage your constituents.

Presenters:

- Ken Cantu, Senior Interactive Specialist, Convio
- Lance Melton, Senior Interactive Specialist, Convio

Track 2 | Room: Sabine



On Common Ground™: The Constituent Relationship Management (CRM) System for Today’s Nonprofit

Ready to move past the limitations and hassles of your legacy donor database? We’ve heard you loud and clear. That’s why we’ve built Common Ground, the first CRM system to move you beyond just storing data, to using data for raising money and advancing your mission. In this session, you’ll discover what problems Common Ground can solve for you, see some “wow!” features that you won’t want to miss, and watch a demonstration of the product in action.

Presenter: Sam Heywood, Manager of Common Ground Operations, Convio

Track 3a | Room: Ballroom A



Engagement Pathways 101: Stellar Strategies for Maximizing Constituent Value

This is a strategy session you won’t want to miss! Learn how three organizations used behavior and online interaction data to identify key constituent segments and then prescribe online treatments for driving segments to highest value goals. In this session, you’ll explore concepts around automated, targeted email series’, personalization and conditionalized content. Note that this session has an optional “how to implement” companion session in Track I, titled Engagement Pathways 102: Implementation Methods for Maximizing Constituent Value.

Presenters:

- Alison Cherry, Online Campaigns and Marketing Director, Beaconfire Consulting
- Matthew Mielcarek, Principal Consultant, Convio
- Marc Ruben, Vice President, eCampaigns, M+R Strategic Services

Track 3b | Room: Ballroom B



How to Find Your Social Media Fit

If your organization is like most, it’s always looking for ways to stretch dollars to boost exposure. In this session, you’ll find out how several top organizations have leveraged social media – including online video, Facebook™, and other emerging trends – to get their message out, move legislation and impact fundraising. You’ll also learn how to approach the social media space from an organization perspective, find out which tools might be the best fit for your organization, and discover ways to get involved with little financial investment.

Presenters:

- Michael Johnston, President, HJC
- Trent Ricker, VP Account Services, Convio
- Holly Ross, Executive Director, NTEN
- Judi Sohn, VP of Operations, C3: Colorectal Cancer Coalition

Track 4 | Room: San Antonio



Migration Nuts and Bolts Workshop (repeat session from Nov 18)

The Getting Active with Convio Migration Program has been operating smoothly for more than a year. So, what are you waiting for? Take advantage of the benefits of the Convio platform and plan your migration. This workshop will review the migration process – what happens when you migrate, how to prepare, what we'll take care of for you, and what work you'll need to do. If you're considering migration in the next year, this is for you!

Presenters:

- Betsy Gressler, Director of Account Services, Convio
- Sally Heaven, Senior Account Manager, Convio
- Stephen O'Keefe, Senior Project Manager, Convio

Day 2 Breakout Sessions: 11:15am – 12:15pm

Track 1 | Room: Trinity



TeamRaiser™ – You've Come a Long Way, Baby!

Many new TeamRaiser features have come along in the past couple of years. In this session, you'll learn about the latest and greatest features and some Convio tricks of the trade that will make you a power user. You'll also hear examples from Convio clients and get tips on how to evaluate new features to determine if you should be using them.

Presenter: Kate Harwood, Senior Project Manager, Convio

Track 2 | Room: Sabine



Power of the People II: The True Untold Story of the Constituent Empowerment Suite

Empowering constituents to act on behalf of your organization has only grown in importance as the economy prompts people to worry about their money. This session goes beyond last year's Summit session, which covered functional aspects of Widgets and Personal Events, by delving deeper into the best examples of real organizations using Convio's constituent empowerment tools effectively. You'll discover true stories, proven practices, and practical tips on using Convio Tributes, Personal Events and Widgets, and strategies to get constituents involved in supporting your mission.

Presenters:

- Leslie Beck, Associate Director of Internet Strategy, American Rivers
- Catherine Moore, Director, IT/Web, Canadian Cancer Society
- Chas Offutt, Internet Consultant, Convio
- Donna Wilkins, President, Charity Dynamics
- James Young, Senior Product Marketing Manager, Convio

Track 3a | Room: Ballroom A



How Do They Do That? – The Latest Research on Staffing for Online Success

Be the first to view results of our latest market research. You'll learn how your organization's decision structure, internal staffing plan, outsourcing plan and management structure can impact your ability to succeed online. Don't make plans for 2009 without the information from this session!

Presenter: Brian Hauf, Client Success Services, Convio

Sessions – Day 2

Track 3b | Room: Ballroom B



The 7 Habits of Highly Successful Forms

What makes a Convio form successful? In this session, you'll learn how clients like the ACLU, NPCA and Share Our Strength have broken free from the standard Convio templates and developed unique constituent experiences for their donation forms and engagement needs using Convio tools. Learn how they tested various form designs and variables before selecting the optimal experience to deliver results. (And psst... Since they've already done much of the hard work, you can learn from their experience to optimize your own forms!) If you're looking to improve your online constituent experience, this session is ideal for you. No programming skills are required for you to take away a wealth of knowledge that can be applied to your organization.

Presenters:

- Michael Cervino, Vice President, Beaconfire
- Dimitri Lundquist, Interactive Specialist, User Experience, Convio
- Tompkins Spann, Senior Market Strategist, Convio

Track 4 | Room: San Antonio



Migration Open House (repeat session from Nov 18)

Join us for this migration open house, and find out everything you've ever wanted to know about migration but were afraid to ask. This information-packed discussion about migrating from GetActive to Convio is an open forum without a formal presentation. You can ask experts all your product and service questions, and get advice and information from account managers, project managers, and others. No slides, just answers.

Presenters:

- Van Do, Senior Account Manager, Convio
- Betsy Gressler, Director of Account Services, Convio
- Stephen O'Keefe, Senior Project Manager, Convio
- Katrina Schold, Principal Services Engineer, Convio

Day 2 Breakout Sessions: 1:15 – 2:15pm

Track 1 | Room: Trinity



Engagement Pathways 102:

Implementation Methods for Maximizing Constituent Value

This session serves as a technical “how to implement” companion session to Engagement Pathways 101: Strategies for Maximizing Constituent Value from Track III, which covers proven approaches to moving constituents through a series of interactions with your organization. In this session, you will look at the Convio administrator interface to explore the workflow for using Convio Query to create audience segments. You'll also explore configuring and scheduling recurring welcome series and monthly donor conversion series email messages. It is recommended that you also attend Engagement Pathways 101 so that you can understand engagement pathway strategies, however, it is not required.

Presenters:

- Molly Brooksbank, Senior Interactive Consultant, Convio
- Brad Duff-Hudkins, Interactive Consultant, Convio
- Shara Kilarski, Project Manager, Convio

Track 2 | Room: Sabine



Hot Topics in Email Delivery: Lower Your Spam Complaint Rate and Email List Churn

Take control of your spam complaints and improve your email reputation! In this session, you'll see an overview of Convio email delivery features including highlights of major product and infrastructure enhancements. You'll also learn everything you need to know about Convio's new reputation-based system of pool mailers, Habeas whitelisting service, and append policy.

Presenters:

- Bill Pease, Chief Scientist, Convio
- TJ Spinks, IT Operations Analyst, Convio

Track 3a | Room: Ballroom A



Advanced Online Fundraising Techniques: Navigating Sustainer Giving and Membership Programs

Who doesn't want the gift that keeps on giving? Sustainer contributions — when your supporters make regular, scheduled donations to your organization each month, quarter, etc. — are a great way to create a more consistent stream of online financial support. But, successfully navigating the sustainer waters requires an understanding of how to both launch and carefully maintain a compelling program that keeps these valuable donors from jumping ship. In this session, you'll learn about sustainer giving and how Convio donation tools can help manage your efforts. You'll also hear lessons learned by organizations who have built successful sustainer programs.

Presenters:

- Sue Citro, Senior Manager, Digital Membership, The Nature Conservancy
- Betsey Fortlouis, Senior Director, Member Communications, ASPCA
- Andrew Magnuson, Interactive Consultant, Convio
- Kenan Pollack, Senior Interactive Consultant, Convio

Track 3b | Room: Ballroom B



Engaging the “Wired Wealthy”

New research shows that the Internet is a preferred way for major and middle donors to engage with nonprofits. Convio, Sea Change Strategies, and Edge Research teamed up to survey more than 3,000 donors from 23 major nonprofit organizations to determine the online behaviors and preferences of one of the nonprofit sector's most important constituents. You'll leave this session with four strategies that you can use now to improve your online relationship with wealthy donors.

Presenters:

- Vinay Bhagat, Chief Strategy Officer, Convio
- Colleen McCulloch-Learch, Senior Research Analyst, Edge Research
- Mark Rovner, Principal, SeaChange Strategies
- Beth Wallace, Vice President, Conservation International

Sessions – Day 2

Day 2 Breakout Sessions: 2:30 – 3:30pm

Track 1 | Room: Trinity



Applying Advocacy Best Practices on the Convio Platform

In this session, you'll learn tricks and tips on how to apply best practices for advocacy to Convio. From targeting decision makers to setting up your alerts and more, this session will show you how Convio staff and clients set up their Action Alerts to make them compelling and easy for your end users to take action — and, of course, to effect policy changes!

Presenters:

- Robin Anderson, Interactive Specialist, Convio
- Chris Burley, Director, Online Campaigns, Defenders of Wildlife
- Sally Heaven, Senior Account Manager, Convio

Track 2 | Room: Sabine



Walk, Run, or Ride – Take Your Event or Event Series to the Next Level

Need some fresh ideas for your walk, run or ride event? In this session, you'll learn how your organization can move beyond the standard TeamRaiser deployment to support an event. You'll learn about new TeamRaiser features, Convio Open APIs, and Extensions, including Single Sign On and Convio Widgets, and how they can contribute to the success of your event. You'll also find out how Personal Events can empower constituents to prepare for and promote your event. You'll have a chance to share ideas with your peers and discuss challenges on the topics covered.

Presenters:

- Mark Becker, Founding Partner, Cathexis Partners
- Noel Beebe, Product Manager, Convio

Track 3a | Room: Ballroom A



Doing More With the Same: Using Reporting and Testing to Get Better Results for Your Existing Online Programs

Your budget might be tight, but you can increase fundraising and advocacy results by using benchmarks and testing to optimize your online program. In this session, you'll hear about successful real-world reporting and testing that will yield better outcomes for your program, without adding any additional cost. We'll even go hands-on and launch a live message during the session.

Presenters:

- Markus Beeby, Senior Interactive Consultant, Convio
- Elizabeth Nielsen, Online Fundraising Manager, Feeding America
- Michael Ward, Senior Vice President, M+R Strategic Services

Track 3b | Room: Ballroom B



Understanding Your Audience: New Tactics for Deep Listening

The online world gives you new and creative ways to get to know your constituents — conducting research and seeking feedback to help you drive decision-making around your marketing strategy and website user experience. In this session, find out about new and cost-effective tactics and techniques for deeply engaging with your constituents. You'll learn about online focus groups, closed communities, user interviews, creating constituent personas, and other proven approaches for ensuring that you give your audience what they're asking for.

Presenters:

- Alia McKee, Principal, Sea Change Direct Marketing
- Misty McLaughlin, Manager of User Experience, Convio

Conference Features

Birds of a Feather Discussion Tables Tuesday, November 18 over lunch | Rio Grande

Take a break, have a bite, and gather with like organizations to network and share ideas. This is your opportunity to connect with your peers who are doing similar work with Convio. Tables will be labeled with discussion topics.

Buses to Downtown Austin Tuesday, November 18 | 7:00pm – midnight | Front of hotel

Find out why Austin is called the “Live Music Capital of the World”! Round trip bus rides from the Renaissance hotel to downtown Austin will be provided. Please note the flyer in your conference bag for more details, including a map highlighting some downtown restaurants, plus bars with drink specials for Summit attendees.

Client Lounge Tuesday and Wednesday, November 18 - 19 | Nueces

Need to get away from the conference for a few minutes? The Client Lounge is a “Convio-free” space just for you. Stop by, sit down and relax. Or, catch up on your email at one of our free email stations.

Connection Café Blog Lounge Tuesday and Wednesday, November 18 - 19 | San Saba

Interested in sharing your nonprofit’s online success stories, future campaign plans or your favorite aspects of attending this year’s Summit? Stop by the *Connection Café*, Convio’s blogging lounge, to meet with the Convio blog team and let your story be told in a video or guest interview. Be sure to also visit *Connection Café* blog throughout the week to read live blogging from the event, catch video interviews of your peers and join in the discussion at www.connectioncafe.com.

Demonstration Room Tuesday and Wednesday, November 18 - 19 | Brazos

See live demos of new and exciting tools as well as updates to classic favorites. Demonstrations will include: Common Ground™, CMS, MultiCenter, Convio Open APIs, and much more! Stop by during any of the scheduled times to see the demo of your choice. Please note the flyer in your conference bag for more details.

Exhibit Hall Tuesday and Wednesday, November 18 - 19 | The Arbor

Visit with companies and organizations that provide services to the nonprofit sector. Talk with them about your organization’s ideas and plans, and find out how they can help you turn your dreams into reality.

Expert Lab Tuesday and Wednesday, November 18 - 19 | Wedgwood

Take your questions about Convio products or about your own Convio site to the Expert Lab and get them answered. Stop by and speak face-to-face with a Convio expert. Experts will meet with you on a first-come, first-served basis. Please note the flyer in your conference bag for more details.

Lunch with YouTube™ Wednesday, November 19 | Rio Grande

Learn how your organization can make a bigger impact, raise funds and find new supporters with the use of online video by joining YouTube for lunch. Nonprofit and Activism Manager at YouTube, Ramya Raghavan, and Convio clients participating in the YouTube Nonprofit Program will share success stories, best practices for connecting with your audience using video, and in-depth advice on how you can get started or enhance your current online video efforts.

Meet Your Account Manager Tuesday, November 18 | San Marcos

Convio account managers want to meet you in person. They’ll be available to meet you on a first-come, first-served basis. Be sure to stop by and say “hi”! Please note the flyer in your conference bag for more details.

Nonprofits succeed with Care2

How does Care2 serve nonprofits?

With over 9 million members, Care2 is the largest information and action site for people who care to make a difference.

Valuable new members & donors

Using permission-based marketing, Care2 recruits high-quality supporters and prospective donors for your organization from our 9 million civically active and engaged members.

Results-based pricing

You only pay for qualified leads, eliminating the uncertainty of traditional impression-based advertising. Care2 guarantees unique names with every campaign, further enhancing the value of your investment.

High volume

Care2's campaign team delivers guaranteed results--on time and often exceeding goals. With our contextually relevant messaging, we deliver the most qualified prospects to support your campaign.

Easy process

Care2's experienced campaign team works collaboratively with you on messaging. Then, we do all the work to create, launch, track and report on your campaign so you only have to focus on the results.

We get results

Hundreds of leading nonprofits use Care2 to recruit our mostly female members, aged 25 to 65 (average = 39), with strong values and a desire to support health, children, the environment, human rights, and many other causes. Try us!

Grow.

