

Your Guide to Understanding Data Management with Convio



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Introduction

Data is the cornerstone of all online and offline fundraising and outreach programs. Without detailed, accurate and up-to-date information about your constituents — such as their giving history and contact preferences — you cannot effectively engage them. Some critical information is captured in your offline donor database, while an online application suite like Convio captures another set of data in its own database. It is critical to maintain consistency between these two databases.

More recently, new technologies, social media websites, and online applications have opened up a wealth of new opportunities for nonprofits to share data beyond the world of online and offline databases. These integrations can extend the value of Convio applications, provide richer experiences for end-users, and generate better results for your organization.

By widening its application infrastructure to integrate more tightly and easily with external systems, Convio has strengthened its leadership position in the market for online marketing and fundraising tools, particularly compared to other “closed systems” or single-purpose “point solutions.” Whether or not your organization takes advantage of the data integration possibilities of Convio today, the fact that Convio offers this capability ensures that your investment in the Convio Online Marketing suite will be secured.

This paper will familiarize you with the ways in which Convio can share data with other systems, and provide you with a baseline of understanding about the terminology and technologies Convio employs. With this information, we believe you will have more informed and productive conversations with Convio account executives and solutions engineers about the right approaches to meet your organization’s goals.

Types of Data in Your Universe

For the purposes of this discussion, think of data as nothing more than distinct pieces of information. On a constituent level, for instance, this includes general information about each constituent (e.g., their name, ZIP code, etc.), about his or her actions (e.g., they gave a \$100 gift last year, they attended a certain event, they subscribed to your email newsletter, etc.), and about his or her interests and preferences (e.g., they prefer dogs to cats, they like to be informed when there is an event in their area, etc.).

Some organizations view their donor database as a master database of record; and thus, want it to store *all* the information they have related to constituents. On a practical level, this is usually either impossible technically due to limitations in the offline database architecture, or simply unnecessary. Assuming a system can even exchange

As a general rule, you should *only* integrate data with Convio that will help you achieve better online results.

a piece of data with another system, the ultimate test of whether it should be exchanged is whether that data can be used productively in the other system. In Convio's case:

- **Any data related to a constituent's *online* activity that is not already in Convio probably should be shared with Convio.** As you already know, any constituents' email addresses stored in your donor database should be imported into Convio for upcoming email campaigns. Likewise, some records of online activity in third-party systems integrated to Convio using an API (see *Data Integration through Application Programming Interfaces* later in this paper) should be stored in Convio. In most cases, donor databases are not capable of storing records about online activity, such as the number of emails sent in a campaign, or which constituent visited your website.
- **Any data *purely* related to a constituent's *offline* activity generally should *not* be exchanged with Convio.** For example, data that a constituent called your office requesting information about volunteer opportunities should not be shared with Convio. (However, you might wish to flag in Convio that the constituent is interested in volunteering so that you may send him or her information via email about upcoming opportunities.)
- **Constituent contact information should generally be shared between systems.** Being able to identify and reach your constituents is critical. It is important, however, to respect constituents' preferences regarding contact methods (email, phone, etc.).
- **Data that is purely back-office in nature should never be imported into Convio.** There is nothing Convio software can do with your organization's accounting records, internal emails or Human Resource records, for instance, and has no way to store such information.

Once you have identified all the specific pieces of data available to your organization that you feel can be used effectively in your online marketing efforts, you can then begin to explore the best ways to integrate this data.

The Rationale for Multiple Databases

Some people question the need for multiple databases, and why getting databases to "talk" to each other is not straightforward. This is a complex issue. It has little to do with the fact that the databases may be supplied by different vendors. Rather, it is largely because different databases and the applications that use them are optimized for very different needs. No system can be all things to all people.

For example, a database-driven website like those powered by Convio must have extremely high availability (24 hours a day) and performance — your visitors expect that your website will always be up and running smoothly, with no lag in response time when, for example, they make a donation. One reason Convio can achieve this is because it does not frequently access

large files, nor process large queries that eat computing power and slow down the applications.

In contrast, an offline donor database is not used all the time. Its use may be limited to a handful of individuals at your organization, but never by the general public. Furthermore, a large nonprofit might use it to query millions of database records to create mailing lists, for instance. Such complex operations can temporarily degrade database performance, but this does not result in a negative impact to your organization, and your constituents would not be aware of it. Conversely, it is a serious problem if your website is down and your constituents could not make an online donation when they wanted to.

It would be practically impossible to design a database system that is optimized both for the high availability and performance needs of websites, but could also run complex queries with millions of records, integrate with multiple other systems in your office, and enforce tight access controls and business logic rules — all with no degradation in performance.

In addition, different database systems manage data in different ways. Consider the issue of contact information. In the direct mail world, correct capitalization and salutation of a recipient's name is important: would you respond to a mailing that spelled your name wrong? The online world is more forgiving with capitalization, and salutations are less commonly used. Or, if a mailing address contains an error, the recipient might never receive your piece. In the online world, email addresses can be verified quickly and thus have a higher likelihood of being received. Resolving duplicate records is another issue. If a constituent receives two pieces of direct mail from your organization on the same day, this reflects badly on your organization and costs you real money. But while receiving two emails from the same organization is never desirable, online users tend to be more forgiving about this, and your incremental cost to send a duplicate email is nearly zero. Because of these kinds of differences, there is some effort in integrating data between the online and offline worlds.

Beyond the technical architecture issues, it is relevant to consider the different types of end-users for these database-driven products. Convio, for instance, is designed to be easy to use for marketers and fundraisers, whereas many donor databases are designed to be used by highly-technical database administrators. The intended user audience for software products drives a wide range of considerations, including how the user interface is presented and the functional capabilities of the product.

The ideal scenario is not one massive product from a single vendor that can do absolutely everything. Rather, it would be a suite of products in which each one is optimized and best-in-class for the specific tasks it must handle — and that each of those products could communicate only what it is relevant between them. This is precisely the philosophy behind Convio's data integration work.

Approaches to Data Integration

Convio offers several approaches to integrating data between the Constituent360™ online marketing database and a donor database, as well as between Convio and third-party applications and websites. These include:

Donor Database Integration

Import/export	For infrequent exchanges of small batches of data between Constituent360 and any system that can process CSV files.
DataSync	For exchanging data between Constituent360 and most popular third-party donor databases. DataSync combines an import and an export into a single operation.
Connectors	Provides more robust integration capabilities using connections to augment a DataSync between Constituent360 and a select group of third-party donor databases.

Third-Party Applications and Website Integration

APIs	Allows external applications and websites to communicate with Convio applications. (Convio's API cannot be used to integrate with a donor database.)
Extensions	Allows Convio applications to leverage the capabilities of external systems.

Each of these approaches is explored in more detail below.

Integrating Data with Donor Databases

The most effective fundraising and marketing campaigns combine online and offline elements. For example, your organization might plan to execute an integrated marketing campaign that includes an online donation page, a phone campaign, and a direct mail drop. To maximize your results, you will want to leverage data stored in both your Convio online database and offline donor database to better segment your lists and personalize communications. And during the campaign, you will want to track your results and store it in one or both databases so that you can plan even more effective campaigns in the future. Sharing constituent and transaction data between online and offline systems is therefore essential.

Convio supports three methods for exchanging data between Constituent360 and your donor database: basic import/export via CSV files, standard DataSync, and through Connectors. The key differentiators of these approaches are summarized in the table below.

	Import/Export	DataSync	Connector
Databases supported	most*	most*	Blackbaud The Raiser's Edge®, Salesforce.com®
Automated scheduling capability	no	yes	yes
Automated CSV file formatting	no	yes	yes
Real-time look-up of info in database by Convio applications?	no	no	yes
Check for duplicates in donor database upon creation of a new online user profile?	no	yes	yes
Software installation required?	no	no	yes
Hardware and network configuration required?	no	no	varies**
Included with Convio?	yes	no	no

* - The database must support the import and export of CSV files. Most do. See *Basic Import/Export* for more information about CSV files.

** - Depends on your existing network infrastructure.

These methods of donor database integration are only applicable if your organization has a donor database in place. If not, you might want to consider Convio Common Ground™ CRM — an integrated solution built on one of the leading CRM systems in the world, Salesforce.com's Force.com platform.

Basic Import/Export

All constituent and transactional data stored in Constituent360 can be exported to a comma separated value (CSV) file, which can then be imported into most donor databases.

You can create a CSV file by running one of the standard comprehensive reports built into Convio, using the Query tool or, for certain Convio applications, by creating a custom report containing only the data you need to export using Convio's Report Writer functionality.

A CSV file is a text file in which discrete pieces of data are separated by a comma character. Each line in the file corresponds to a row of data. Microsoft Excel is often used to open and edit CSV file types in a spreadsheet layout. For example, the comma-separated text string:

- me@EmailAddress.com,123 Main St.,Austin,TX,78759 would be imported into the database as the row:

About Common Ground

Common Ground builds upon the services and functionality of a comprehensive, continually improving CRM foundation, with a customizable, flexible system that is tailor-made for nonprofits. Because the Salesforce.com database is web-based, there is no software to install or maintain, and no hardware to purchase. Choosing Convio's Common Ground CRM as your database of record allows you to take advantage of the automatic synchronization with all of Convio's online marketing and fundraising products. You can easily capture all online record changes, gifts, and major interactions.

Email Address	Mailing Address	City	State	ZIP Code
me@EmailAddress.com	123 Main St.	Austin	TX	78759

This process is supported bi-directionally. Most donor databases can import and export data in CSV format, and Convio supports the input of CSV files. To note, a handful of less common and “home-grown” donor databases do not support the import or export of CSV files.

The import/export method to data integration might work well for small amounts of data, transferred infrequently, or for occasional “one-off” needs. Nonprofits with very small house files, or those that do not run many offline marketing campaigns, often find that this method of data integration meets their needs. Because this capability is built into Convio, some nonprofits choose to begin integrating data using this approach and later switch to DataSync when they grow larger and their data integration workload increases.

Importing and exporting CSV files is a manual process, and as such requires time and care to implement. If you are new to this role, you may want to be prepared to manipulate the CSV files prior to import or export to ensure that the sequence of fields matches what the recipient system expects (for instance, that the first column of data will be a unique constituent identifier). Most administrators also inspect the CSV files for duplicates, errors, or fictitious constituent records before import and delete any rows of such data.

DataSync

Convio DataSync adds a degree of automation to donor database integration that provides significant efficiencies over a standard data import/export. DataSync saves your database administrator time, and reduces the chance of errors resulting from incompatible file formatting in a variety of ways. For instance, the CSV files that are exported from Convio will be automatically formatted for immediate import into your donor database, requiring no file manipulation. Furthermore, DataSync can be set to run on a fixed schedule. In addition, Convio provides an easy-to-use administrative interface for managing the entire sync process.

Implementing DataSync begins with a Convio professional services engagement to ensure that the data you gather online will be synchronized with the appropriate corresponding field in the offline database (this is referred to as “data mapping”), with a defined set of business rules that control import and export behavior.¹ Once the mapping is established, on an ongoing basis DataSync provides:

- **Bi-directional synchronization of constituent data, such as contact information.** Convio DataSync provides built-in tools to address the two most common issues that occur with synchronization: collisions and duplicates. Records for the same constituent

¹ An example of a business rule is a transformation. For instance, Convio has a field called “Accepts_Email” while many databases have a corresponding field called “No_Email.” A field value of “yes” in the former should be a “no” in the latter. DataSync can automatically flip these values when data is transferred to ensure they match.

occasionally get updated in *each* database after the last sync was run, thus making it unclear which record contains the correct information. During the sync process, this will result in what is called a *collision*. In that event, these records will be held in a file for an administrator to review, or either Convio or the database can be configured so that its record automatically takes priority. In addition, Convio provides tools to automatically identify and help eliminate duplicate records from being transferred to your donor database. All potential duplicates can be reviewed and reconciled in Convio prior to downloading to the donor database.

- **Downloads of online transactions.** All transactions executed by a constituent using Convio — such as online donations or purchases made through Convio eCommerce — are transferred to your donor database. Records of transactions made offline, such as a gift to your organization by check, are not transferred into Convio.

These synchronizations are performed at a time interval that you specify (for example, once per week), not in real-time. The only data exchanged are new entries, or entries that have changed since the last time the synchronization was performed. Data is transferred in batches, which is why these data exchanges are sometimes called “batch transfers.”

Like Import/Export, DataSync is available for any donor database that supports the transfer of CSV files. A newer technology — a Convio Database Connector — is now available for certain donor databases and provides additional capabilities.

Convio Database Connectors

Convio Database Connectors represent a leap in data integration capabilities for Blackbaud’s The Raiser’s Edge® and Salesforce.com. If you have one of these databases, Convio strongly recommends you use a Connector instead of a standard DataSync.

A Connector is actually two pieces of software that work together. One component is installed and managed by Convio at the same computer facility where Convio’s online applications reside. The other component is installed on a dedicated computer in your organization’s network. Together, these two pieces of software serve as a communication bridge

Case Study: MAP International

The Challenge

- Wanted to synchronize data between online marketing database and offline donor database to have a complete and up-to-date view of all constituent relationships
- Needed to reduce manual processes and duplication errors

The Solution

- Selected Convio Online Marketing and Connector RE
- Data integration enables online communications to be up-to-date and personalized to constituents based on information stored in The Raiser’s Edge

The Results

100% more efficient in gift entry and auditing due to the import/export features of Connector

30 minutes is all it takes for all online and offline data to be up-to-date and synchronized between the two system

between your donor database and Constituent360. The two components communicate with each other over any high-speed Internet connection.

In addition to the basic data integration capabilities of Convio DataSync, Connectors provide a richer experience for online users and have additional functionality to avoid duplicate records from being created. A Connector retrieves data from your donor database in real-time when it is requested by Convio applications. For instance, if an offline constituent claims his account online, the Connector could fetch his name, address and phone number in real-time from your donor database, populating his online profile automatically. A registered website visitor will always see the most up-to-date information when they view their profile online, including information that was provided and updated offline, and can benefit from personalized website content.

The added benefits of Connectors come with some additional technical complexity, and as a result implementing a Connector requires some additional work. Your organization might require a dedicated computer to run it. In addition, some configuration of your organization's router or firewall is required to allow the Connector software installed at your site to communicate with the corresponding software at Convio.

Managing Donor Database Integration

Managing your data requires time and diligence, and the technology provided by Convio serves to facilitate the process. To estimate the amount of effort required to manage database integration, it helps to consider a few interrelated dimensions: the quantity of work anticipated (the overall workload), the frequency of synchronization, how long it will take, and the staff you have available.

The Workload

Keeping your Constituent360 and donor databases synchronized requires ongoing attention. The bulk of the data integration effort is up-front, when you first implement Convio, depending on the number of constituents for whom you have no email address, and who convert from an exclusively offline relationship with your organization to an integrated (online and offline) relationship. Once over this initial synchronization "hump," the ongoing data management effort tends to be reduced.

Because every organization is different, it is difficult to provide specific guidance but, in general, factors that can minimize the integration workload include:

- New constituents initially engaging with your organization online, providing an email address and current contact information.
- Having email addresses for most of your constituents in your donor database. Email addresses are unique and, though not permanent, are rarely reclaimed by a different

user in a short time period. In contrast, names are not unique, and mailing addresses have frequent variations in spelling and change when people move.

- Performing the majority of your marketing work online (little or no use of direct response fundraising, for instance).
- Synchronizing your data frequently result in less collisions
- Encouraging website visitors to log in or accept a cookie when visiting your site, which can minimize the overhead related to duplicate records

Frequency and Time Required

How often your organization should run a synchronization process (a “sync”), and how long it will take each time, are related issues.

Determining how often your organization should run a sync depends on a few factors. The key issue is simply the level of online activity your organization is experiencing. If you receive dozens of online donations or get multiple user profile changes every day, you might want to sync once per day; otherwise, once per week would usually be sufficient. In general, the larger your organization, the more often you should sync.

Another issue to consider is how many campaigns you run. If you only run two per year, for instance, you could theoretically wait six months to sync your databases. In practice, however, you would not want to sync less often than once per month.

Your most important goal is to prevent an insurmountable backlog from developing. The longer you wait to synchronize databases, for instance, the more collisions are likely to occur. It will always be easier to sync small samples of data more frequently than large samples less frequently. Through some experimentation and in consultation with your Convio account manager, you will be able to identify the sync frequency that best meets your needs.

How long it takes to run a sync is a function of how many records need to be processed, how many collisions occur, and how many duplicate records are found. If only a handful of records are being synchronized, with no collisions or duplicate records to evaluate, the entire process could take just a few minutes. Larger nonprofits that are managing over one million constituent records and running multiple integrated campaigns concurrently will obviously require more time per sync.

Whether you decide to sync once per day or once per week, develop a process and stick to it. The key to staying on top of your data is having consistent procedures that you adhere to, so that you can recognize when things are not right.

Staffing Requirements

Most small- to mid-sized Convio clients assign a staff resource to manage data syncs as part of their everyday duties. Larger nonprofits typically have a full-time database administrator who handles syncs, among other database maintenance responsibilities.

It is best to trust your data syncs to highly reliable, detail oriented staff who can communicate well with other departments and is well-versed in both administering Convio and the donor database.

Data Integration via Application Programming Interfaces (APIs)

For integrating data between Convio and third-party applications, systems and websites other than donor databases, Convio offers application programming interfaces, or APIs. An API is a set of programming tools built into an application that define how other applications can communicate with it, and what information can be exchanged. Convio uses APIs in two ways:

- Convio's Open APIs enable other applications to communicate with certain Convio applications; and
- Convio Extensions facilitate "out of the box" data integrations between Convio and a range of social media websites and web-based applications.

The table below summarizes the differences between the Constituent API and Extensions.

	Convio Open APIs	Extensions
Benefit	Augments the capabilities of Convio products by allowing other sites and applications to transfer data into or out of Constituent360, and use core pieces of application functionality (such as donation processing)	Extends the value of Convio applications to social media sites and web-based applications
Examples	Customized donation forms	Facebook integration
Programming or code modification required?	yes	no; built into Convio
Managed from	external applications and code	within Convio

Convio Open APIs

Convio's Open APIs augment the built-in functionality of Convio applications by allowing external applications or websites to communicate with them.

The Open APIs are both product- and functionality-specific. Some APIs enable external applications to put data into Convio, some take data out, and some execute transactions. Convio Open APIs are currently available for Events, Constituent Management, Donation Processing, Single Sign-On, and TeamRaiser™.²

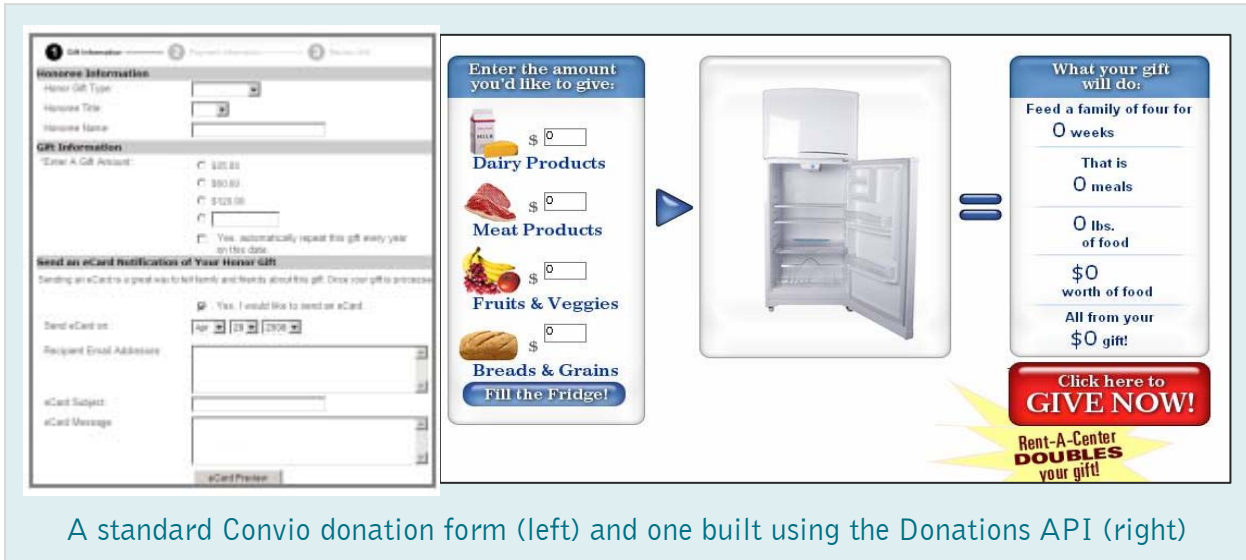
The Open APIs provide three key capabilities:

1. **Take control of the user-facing presentation of Convio applications.** For example, out of the box, Convio allows you to modify the look and feel of a donation form — with some limitations. But by using the Donation Processing API, you could create a donation form that looks like absolutely anything, and use the API to connect your customized form to Convio's donation processing engine. Moreover, you could design donation forms that run outside of common web browsers — for instance, on a mobile phone or within a Flash application — and hook into Convio.
2. **Make Convio application functionality portable.** Perhaps you would like to empower your supporters to create donation forms on their personal websites that generate donations for your organization. Or, perhaps you would like to allow TeamRaiser event participants to display their personal fundraising progress on their blog. With Convio's APIs, these are possibilities.
3. **Combine business processes.** APIs allow you to “slice and dice” data such that some user-requested information could go to one application and some to another. This opens up new possibilities in improving your business processes. For example, rather than have two separate forms, one for an email address to sign up for your organization's newsletter and another one to enter a phone number to sign up for mobile text messaging updates, you could instead create one form that requests both and parses the data to the different applications that utilize this information.

TeamRaiser API

Cathexis Partners, a Convio partner, used the TeamRaiser API to develop an online event check-in process. Accessible from the Participant Center of a major team fundraising multi-day event, the new capability eliminated the need, time and expense of a physical day-of-event check-in process. This saved the nonprofit staffing and location expenses, and provided greater convenience to event participants.

² The catalog of available Convio Open APIs is growing all the time. For a continuously updated list, please visit <http://open.convio.com/api>.



Convio takes an open approach to APIs and fosters a collaborative community environment. All the programming code and supporting documentation for these APIs is publicly available, and Convio encourages developers using them to exchange their code examples and share best practices

The level of technical skill required to implement Convio APIs varies based on the extent to which you modify the API's intended functionality. Each API has a real-world reference example with well-tested and documented code. If you are proficient with HTML and JavaScript, you can modify the code in these examples to suit your needs, within certain limits. For example, Convio's current library of APIs assumes that you will be running your application in a standard web browser. If you want to run it on a mobile browser, for instance, you will need additional technical skills. If you do not have the in-house technical skills required to modify APIs, you can engage Convio or a third-party development organization to assist you.

Convio Extensions

Whereas the Constituent API allows external applications to exchange data with Convio applications, Extensions allow Convio applications to interact with third-party web platforms like Facebook and Google through the use of *their* APIs.

Facebook Integration

Developed by Charity Dynamics, a Convio partner, *Boundless Fundraising™* bridges Convio TeamRaiser with Facebook — extending fundraising capabilities and multiplying the outreach value for an organization. The Facebook application exceeded all expectations in its first implementation — helping Susan G. Komen for the Cure Austin Affiliate toward its \$1 million fundraising goal set for the 2008 Komen Race for the Cure, a 5K race benefitting the fight against breast cancer.

Convio Extensions provide more choices to create unique engagement strategies. In addition to driving constituent traffic to their websites, organizations can use social media sites that are already popular with constituents to engage them — while sharing data with the Convio platform to keep relevant information centralized in one location.

For example, your organization can use the Convio Extension that was built specifically to integrate with Facebook. With this Extension, a Facebook user can donate or take action from his or her own Facebook page, and the information be relayed in real-time back to the Convio database. In addition, friends of the individual could also receive a notification via their Facebook News Feed that this person donated or took action. At the same time, your organization can push content, such as the latest fundraising or advocacy campaign, to the constituent's Facebook profile page. The immediate and viral nature of such activities that take place through social media sites dramatically expands the potential universe of constituents that your organization can reach.



Sample Facebook page for a nonprofit organization

Other Convio Extensions have been created to integrate geographical data with Google Maps, automatically share TeamRaiser™ photo albums with Flickr, embed YouTube videos within websites, syndicate third-party content to your site, and much more. Additional Extensions are always under development; see <http://open.convio.com/extensions> for a current list.

Unlike Convio APIs, all Extensions are built-in to Convio and immediately available to you as a client, and without any programming work required. All setup and administrative tasks related to managing these Extensions are performed from within Convio's administrative tools.

The range of things an Extension can accomplish is limited by the capabilities provided by the third-party's API. For example, Flickr's API allows Convio applications to upload photos to its site, but not to search photos on its site. Conversely, YouTube allows Convio applications to search for video content, but not upload it.

Mobile Commons Extension

Built by Mobile Commons, a Convio partner, mCommons allows nonprofits to integrate mobile messaging into campaign strategies, CRM and websites to help grow constituent lists and keep people connected. During the 2008 election, NARAL Pro-Choice America increased their text message subscriptions over 70 percent in only three months giving them the ability to reach different demographics and raise awareness. And, through the Mobile Commons and Convio integration the organizations could capture all email addresses and send to Convio Online Marketing in real-time.

Conclusion: The Importance of Data Stewardship

As you know, your donor data is valuable, and likely your single most strategic asset. Therefore, it should be *actively* managed to ensure its accuracy, quality, accessibility and usability. This concept is also known as *data stewardship*. The key facets of data stewardship include:

Data stewardship is a process. Managing your data is not a one-time project but rather an ongoing process. As with any process, you will get better at doing it over time.

Data stewardship can be challenging. It can be a significant challenge to manage your data well, but well-documented processes and communication can help overcome most obstacles.

It is impossible to automate everything. Software should not replace the occasional need for human judgment to evaluate potential duplicates, identify data entry errors, etc.

Make data a strategic issue. Good data stewardship is more a strategic issue than a technical one. If the right data is collected and used well, it can help your organization make better decisions and advance its mission. Carefully evaluate — and continuously re-evaluate — what data you collect and how you use it.

For Additional Information

Your Convio account executive or solutions engineer can provide you with much more detailed information, and will work with you to identify the best data integration solutions for your needs. You can also find additional useful information at these web pages:

Convio Data Integration: www.convio.com/datamanagement

Convio Open APIs, Extensions, and Connectors: <http://open.convio.com>

About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. The company's online marketing suite offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations.



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