



MOVE PEOPLE

Common Ground

How Integrating with Common Ground Can Benefit Your Organization

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About Common Ground

- *More than a donor database!*
- *A **CRM** solution with donor and relationship management features for nonprofits of any size.*
- Built on the Force.com platform from salesforce.com.



Why We Built Common Ground

Because you asked for ...

- data integration to be cheaper and easier
- leverage off-line data in on-line campaigns and vice-versa
- manage all constituents, not just donors
- a system that fits the way you work, not the reverse
- easier ways customize or extend your database

Common Ground delivers **Simplicity, Flexibility and Choice**

The Common Ground Difference

Common Ground: A CRM solution with donor and relationship management features for nonprofits of any size.

Simplicity

- Easy to try
- Easy to buy
- Easy to use

- Anywhere access

- Automated integration with Convio online marketing products

Flexibility

- Manage all constituent data, not just donors

- Customizations with clicks, not code

- Fits the way you work

Choice

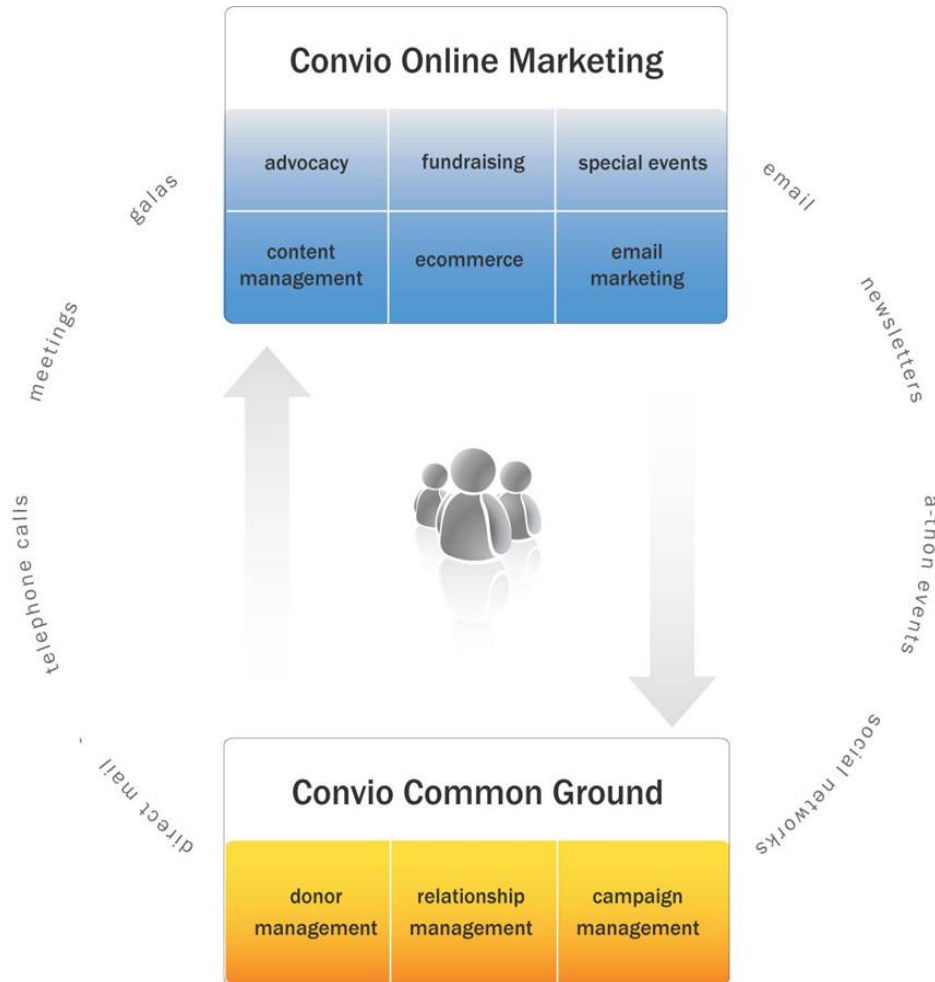
- You can choose the partners to work with

- You can choose to supplement with “pre-integrated” third-party products

Common Ground Pricing

- **\$100** per month per staff user (for 1 to 10 users)
- Minimum of 2 users
- Support included
- On-demand training included
- Includes data connector to Convio's online marketing tools
- Migrations, data conversions, customizations and other implementation options are provided by Convio Solution Partners
- This means...
 - **No** hardware to purchase;
 - **No** setup fee;
 - **No** nickel-and-dime add-on fees to add to your budget.
 - Easy to budget – and with less risk in these financial times.

Using Common Ground With Convio



What's in it for you?

- All constituent profile changes kept in sync
- All online financial transactions available in Common Ground
- All major online interactions available in Common Ground
- Segmentations created in Common Ground available for online use

Integrated Marketing Campaigns

- Using Convio Online Marketing with Common Ground, you can use offline data to improve your online campaigns and vice versa.
- Examples include:
 - Renewal series that gives donors a chance to give online before sending direct mail
 - Email campaign targeting LYBUNT donors or Major Gift prospects, regardless of their previous online behavior
 - Conditional web content based on a donor's total lifetime contributions

Common Ground v2.0 is Now Live

Volunteer Management

- Track jobs, shifts, qualifications, volunteer availability and more.

Event Management

- Multiple event levels, invitation mail merge, check-in manager and expenses.

Duplicate Management

- Merge two or more contacts and all related records.

Additional features

- Track Major Gifts as Pledges
- Create Household Salutations with simple formulas
- Enhanced Pledge and Recurring Gifts
- Enhanced Batch Gift Entry

Demonstration

This will be a brief overview, for a personalized, detailed demo, please contact your Account Manager or email us at:

commonground@convio.com

Thank you! To Learn More

Visit www.convio.com/crm

Where you can

- Register for a trial of Common Ground
- Watch several online demos
- Download a fact sheet

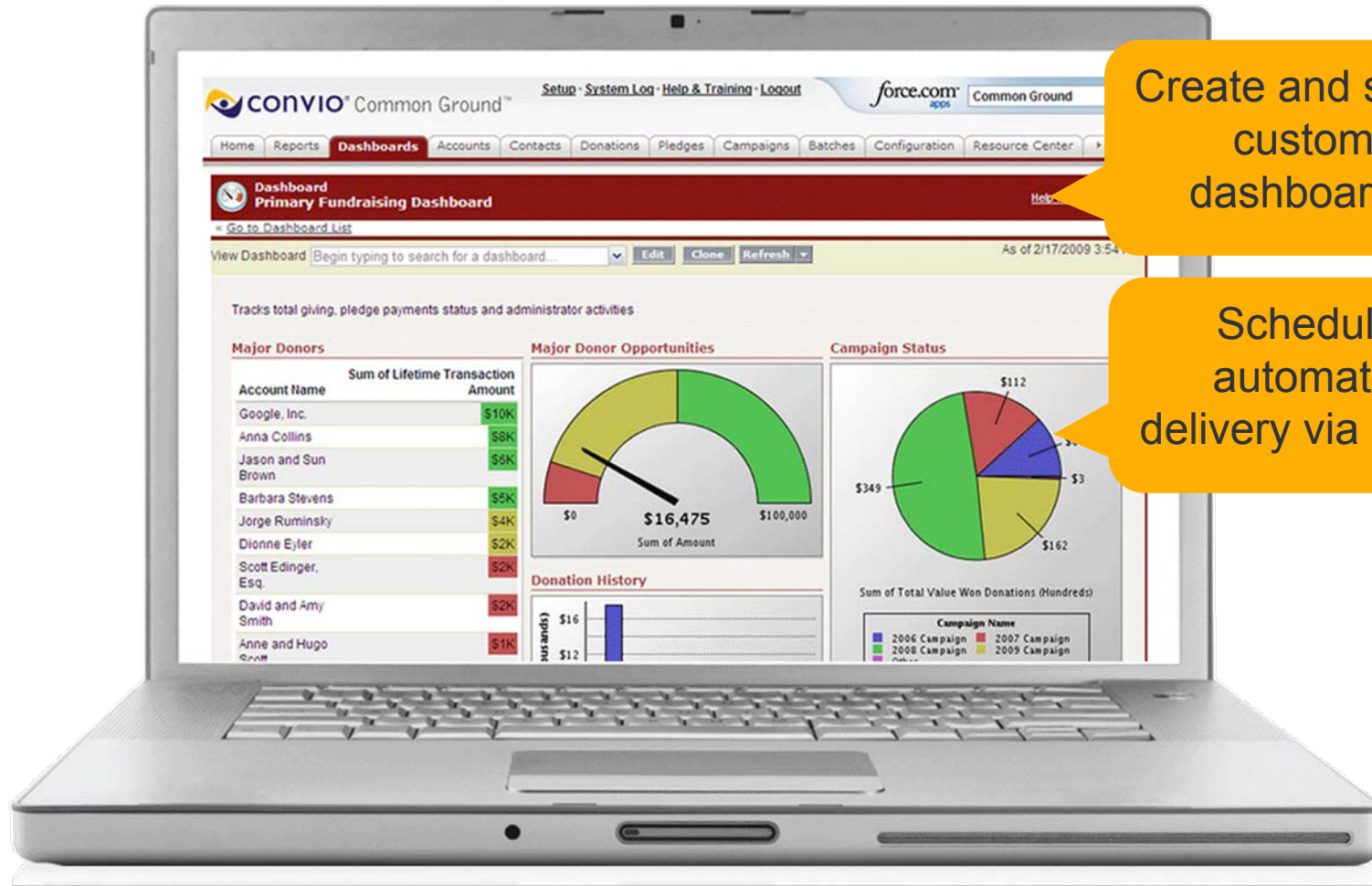
Or speak with an account executive

- commonground@convio.com
- Schedule a 1:1 demonstration

Appendix

Key Feature Screen Shots

Graphic Dashboards



Create and share custom dashboards

Schedule automatic delivery via email

Custom Reports

The screenshot displays the 'Custom Reports' configuration interface, divided into three main steps:

- Step 1: Select the report format**
 - Instruction: "Select the type of report to create."
 - Options: Tabular Report, Summary Report, Matrix Report.
 - Descriptions: "Tabular reports are the simplest and fastest way to list your data." and "Summary reports list your other summary".
 - Buttons: "Save As".
- Step 2: Select the report type**
 - Instruction: "Select the type of data you wish to report on."
 - Dropdown: "Donations".
 - List: Donations, Donations and Pledge, Donations and Primary Classification, Donations and Recurring Gift, Donations and Batch, Donations and TeamRaiser Participant, Donations and Tribute, Donations with Products, Donations with Products and Pledge, Donations with Products and Primary Classification.
- Step 3: Select the grouping for which you would like to calculate summary information**
 - Instruction: "Select columns by which to group your report."
 - Fields: "Summarize information by:" (Campaign Source), "Sort Order" (Ascending), "Group Dates By" (Day).
 - Fields: "and then by:" (Primary Classification), "Sort Order", "Group Dates By".
 - Fields: "and finally by:" (-None-).
 - Buttons: "Run Report", "Export Details", "Printable View".

Chart Settings

Select the type of chart and additional charting options.

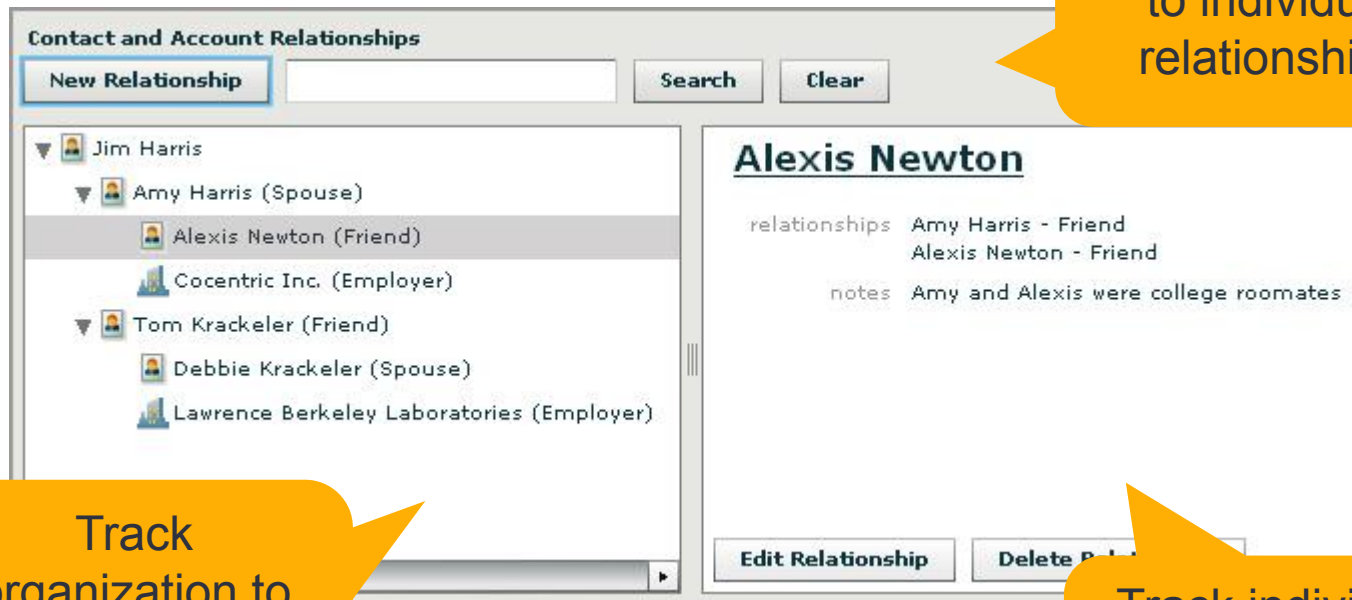
- Chart Type: Horizontal Bar - Grouped
- X-Axis: Sum of Amount
- Y-Axis: Campaign Source
- Groupings: Primary Classification

The chart preview shows a horizontal bar chart with three data series (teal, yellow, and red) grouped by Primary Classification. Red circles with numbers 1, 2, and 3 point to the X-axis label, the Y-axis label, and the legend, respectively.

Build custom reports from scratch or clone existing reports

Add graphs and charts to illustrate results

Track Relationships



Track individual to individual relationships

Track organization to organization relationships

Track individual to organization relationships

Manage Donations and Pledges

Total Opportunity Amount: \$500.00
Choose Designations

Available Designations	Designation	Amount
<input checked="" type="checkbox"/> Women's Issues	Women's Issues	250.00
<input checked="" type="checkbox"/> Children's Issues	Children's Issues	250.00
<input type="checkbox"/> Men's Health		
<input type="checkbox"/> Unrestricted		

Split gifts by two or more "funds" or designations

Create a donor specific payment schedule for pledge payments

Payment Schedule

Weekly
 Monthly On day of every month(s)
 Quarterly On the of every month(s)
 Yearly

Payment Preview Refresh Preview

Payment Name	Date	Amount
Mr. David Barry Pledge Installment 1 of 36	Tue Aug 26 2008	\$33.33
Mr. David Barry Pledge Installment 2 of 36	Fri Oct 3 2008	\$33.33
Mr. David Barry Pledge Installment 3 of 36	Wed Dec 3 2008	\$33.33
Mr. David Barry Pledge Installment 4 of 36	Tue Feb 3 2009	\$33.33
Mr. David Barry Pledge Installment 5 of 36	Fri Apr 3 2009	\$33.33
Mr. David Barry Pledge Installment 6 of 36	Wed Jun 3 2009	\$33.33

Batch Gift Entry

NPSF Test Batch

Close Date: 12-16-2008 3 Entries Valid of 10
\$180.00 Entered of \$3000.00

Num	Status	Donation Type	Donor	Amount	Designation	Acknowledged	Close Date	Campa
1	✓	Individual Gift	Frankie Adams	30.00	Education	Not Acknowledge	12-17-2008	2008 A
2	✓	Individual Gift	Tommy Spann	50.00	Education	Not Acknowledge	12-17-2008	2008 V
3	✓	Individual Gift	Iona Fall	100.00	Education	Not Acknow ▾	12-17-2008	Outrea
4	⊖	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
5	⊖	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
6	⊖	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
7	⊖	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
8	⊖	Individual Gift	- Select Donor -		Education		12-16-2008	2008 V
9	⊖	Individual Gift	- Select Donor -		Education		12-16-2008	2008 A
10	⊖	Individual Gift	- Select Donor -		Education		12-16-2008	2008 A

7 entries not ready to be committed

Validate entries for missing information and against totals

Apply default values to all or some transactions

Create custom data entry screens

Manage Volunteers

Volunteer Information
Cindy Abbott

Help for this Page

Back to Contact: Cindy Abbott

Current Shift Assignments for Cindy Abbott [Find Suitable Volunteer Opportunities](#) [New Sign up](#)

Action	Volunteer Job	Volunteer Job Shift	Status	Shift Date	Number of Volunteers	Credit Hours	Attended
Edit View Del	Do Taxes	Friday	Signed-Up	3/20/2009	1	5.00	<input type="checkbox"/>
Edit View Del	Plant Trees	Jan 15 shift	Signed-Up	1/15/2009	1	3.00	<input checked="" type="checkbox"/>
Edit View Del	Plant Trees	Afternoon Shift	Prospect	3/31/2009	1	5.00	<input type="checkbox"/>
Edit View Del	Plant Trees	Feb 2 Shift	Signed-Up	2/5/2009	1	10.00	<input checked="" type="checkbox"/>
Edit View Del	Plant Trees	Morning Shift	Prospect	3/29/2009	1	3.00	<input type="checkbox"/>
Edit View Del	Can food drive	Morning shift April 2	Prospect	4/2/2009	1	3.00	<input type="checkbox"/>

Cindy Abbott's Availability [Manage Availability](#)

Day of Week	Availability	Available Hours
Monday	8:00 AM to 5:00 PM	9.00
Tuesday	8:00 AM to 5:00 PM	9.00
Wednesday	8:00 AM to 5:00 PM	9.00
Thursday	8:00 AM to 5:00 PM	9.00
Friday	8:00 AM to 5:00 PM	9.00
Saturday	8:00 AM to 5:00 PM	9.00
Sunday	9:00 AM to 12:00 PM	3.00

Cindy Abbott's Qualifications [Manage Qualifications](#)

Volunteer Qualification Type

- [CPR Certified](#)
- [Able to Lift 50+ lbs](#)
- [Carpenter](#)
- [Network Administration](#)
- [Completed Waiver](#)

Track individual availability

Track individual qualifications

Match availability and qualifications to open shifts