



MOVE PEOPLE

Common Ground

The CRM solution for nonprofits

Presented by: Tompkins Spann



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 Offer Common Ground

Because you asked for ...

- all data integration to be simple
- to link online and offline campaigns
- to manage all records, not just donors
- to give your entire team database access, from anywhere
- to customize the database
- a solution you can depend on
- to focus on your mission, not the technology

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

- Automated integration with Convio online marketing products

Flexibility

- Manage all constituent data, not just donors

- Customizations with clicks, not code

- Control access, roles, and permissions

Choice

- You have control of the license costs

- You can choose the partners to work with

- You can choose to supplement with third-party products

A Partnership for Nonprofits



- Founded in 1999
- More than 70,000 clients
- Proven, secure and reliable infrastructure
- Focused on the Force.com platform



Unmatched Innovation

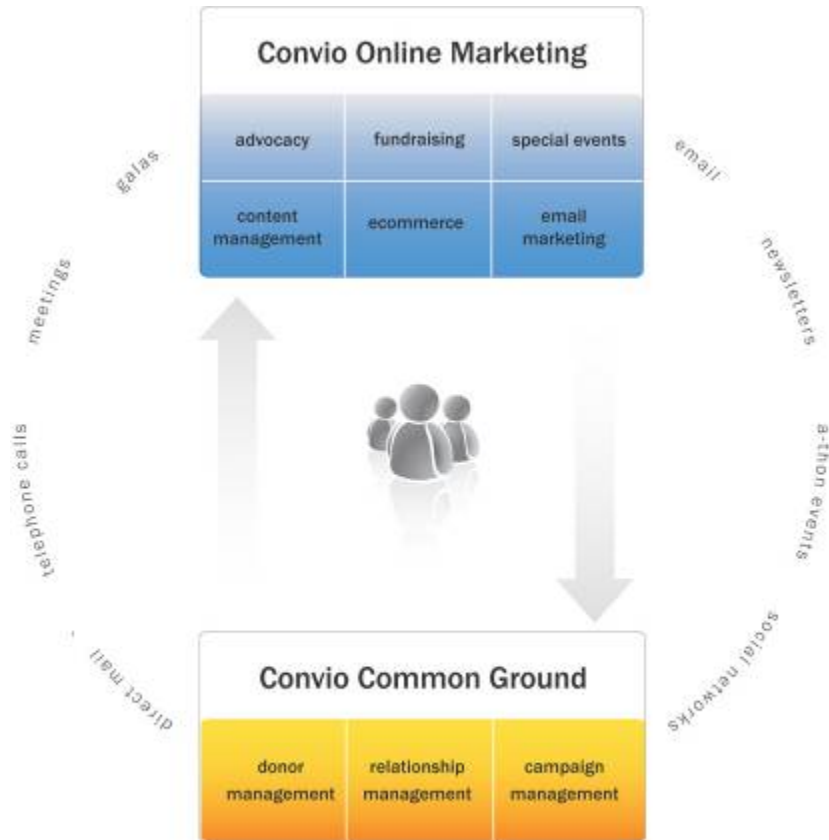
More than 25 Major Releases in 8 Years



Common Ground
3 releases per year

Feb 09 – New release
Jul 09 – New release
Oct 09 – New release

Convio = Multi-Channel CRM



- **Product Integration**
 - Common Ground serves as the core database
 - Constituent segments defined in Common Ground
 - Convio's online marketing products leverage this segmentation
 - Virtually all online interactions are captured in Common Ground
- **Results**
 - Staff focus less on integration and more on creating effective campaigns;
 - 360° constituent tracking

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 (if you use them)
- 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.

Demonstration

This will be a brief overview, for a personalized, detailed demo, please contact us.

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

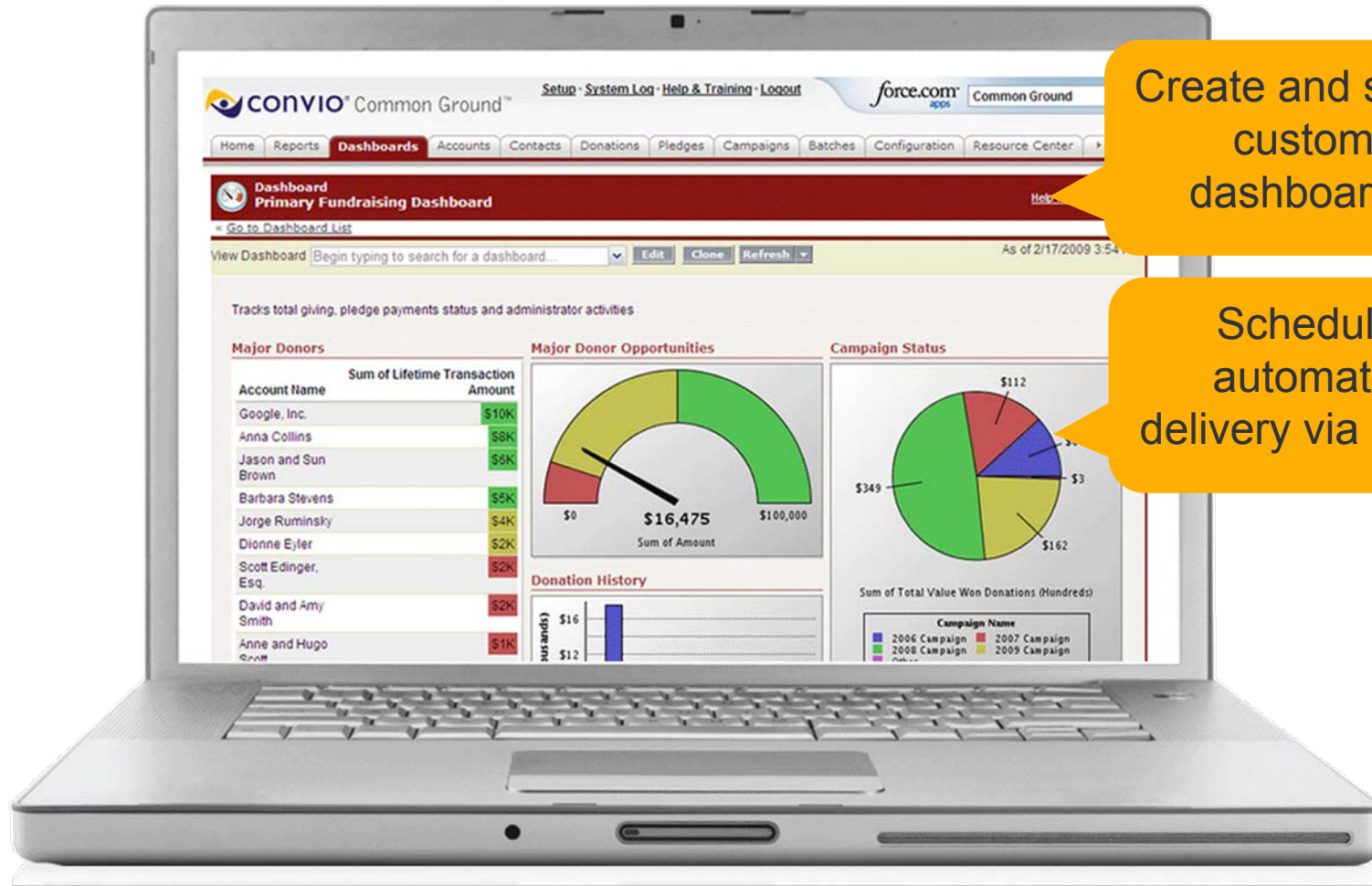
Or speak with an account executive

- 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: "View", "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:".
 - Field: "and finally by:" (-None-).
 - Buttons: "Run Report", "Export Details", "Printable View".

Chart Settings

Select the type of chart and additional charting options.

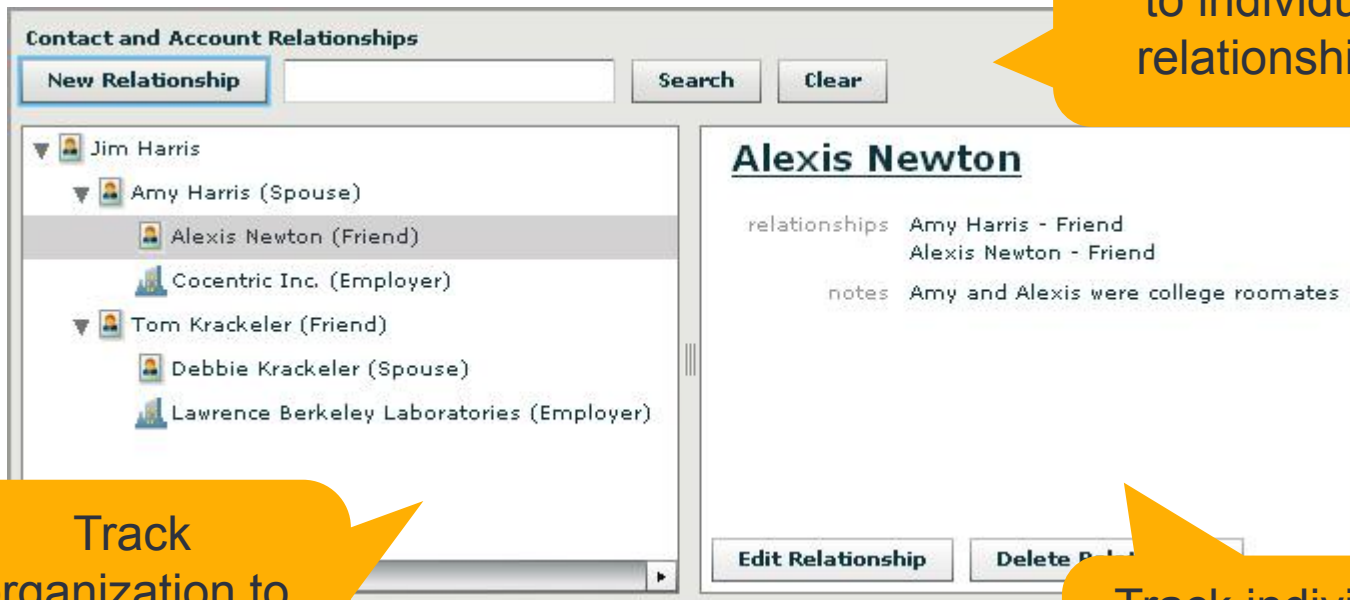
- Chart Type: Horizontal Bar - Grouped
- X-Axis: Sum of Amount
- Y-Axis: Campaign Source
- Groupings: Primary Classification

The chart preview shows a horizontal bar chart with three data series (teal, yellow, and red) grouped by Primary Classification. Red circles 1, 2, and 3 highlight 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
 Quarterly
 Yearly

On day of every month(s)
 On the of every month(s)

Payment 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