Convio DataSync

The most effective fundraising and marketing campaigns integrate online and offline elements. The communications channels complement each other, resulting in greater overall results. Sharing constituent data between online and offline systems is essential to integrated marketing campaigns. It gives you the complete data you need to segment constituents, personalize communications and foster stronger relationships online and offline.

Because you need timely, accurate information about your constituents to effectively communicate with them, synchronizing your online data with your offline donor, member and other databases is critical. Giving history, interests and biographical data give you a comprehensive picture of your constituents, how they interact with your organization and how you can best approach them for fundraising, volunteering and other opportunities. Historically, however, nonprofits have found that exchanging data between the online and offline worlds has been the biggest barrier to effectively managing constituent relationships online. Today, Convio DataSync provides the answer.

Convio DataSync provides the framework for exchanging data between Convio's online database and offline databases to ensure that information is accurate, timely and available for use with online or offline applications for any need — from basic constituent biographical data and giving history verification to strategic event, fundraising, advocacy or membership initiatives. Convio has fine-tuned the data synchronization process to transfer the most effective data for segmentation, personalization and stewardship of constituents.

Convio DataSync: The Framework for Data Exchange

Convio configures the DataSync framework, allowing you to synchronize information from Convio online solutions — including registration forms, surveys, donations and advocacy — with offline donor, member or advocacy databases. An extensive data set allows you to synchronize almost any single piece of online constituent data with offline databases.

Flexible field mapping ensures that the data you gather online is synchronized with the exact field in the offline database where you want it. Convio DataSync also ensures that your online data is reliably transferred, with a configurable set of business rules that control import and export behavior.

To avoid duplicating records between online and offline databases, Convio DataSync matches similar records and offers administrators the option of using a "profile match score" to view and reconcile potential record duplications. Convio also can schedule DataSync data imports and exports with merge and collision logic that automatically generate data files and provide detailed audit logs.

Features and Benefits

DataSync provides a streamlined data synchronization process with predefined data fields of transfer. By evaluating usage over the last seven years with almost 1000 customers, Convio has compiled a list of the most useful transfer fields. By focusing data transfer to these fields, organizations can focus their attention on the elements that matter for online fundraising, advocacy and event management to achieve greater results while reducing the potential for database clutter.

Segmentation and personalization. Use one-to-one communications to create a highly tailored experience between a supporter and a nonprofit organization. Target donors based upon interests and activities, and acknowledge donors to encourage giving and improve response rates on outbound communications.

Source Code Tracking. Measure marketing ROI and channel effectiveness for new constituent cultivation.

Gift Tracking. Track gifts across all giving channels for effective stewardship.

Extensive Database Support. Avoid expensive integration by using Convio's standard data import and export processes. Be confident in Convio's proven success integrating with databases such as Paradigm and DonorPerfect.

Exchange Constituent Data. Reduce manual data entry by downloading key data, including name, address and email address. Keep online and offline data current, including the latest constituent interests, donation information, advocacy efforts and event participation.

Customizable Data Mapping. Match data fields in Convio online solutions with fields in offline database(s), mapping new online data to existing processes.

Simplified User Interface and Dynamic Wizard. A "My DataSync" tab isolates the most frequently used synchronization features for easier process execution. A wizard steps you through the synchronization process, including cross references and duplicate detection.

High Data Integrity. Define rules for handling potential duplicates, specifying when to create a new record, merge information and more. Evaluate potential duplicate records as part of the data synchronization process. Optionally review possible duplicates before exporting to offline database(s). View log of all data synchronization operations including errors, successes and conflict resolution summaries.

Automated Synchronization. Schedule synchronization timing based upon business requirements. Import and export files with automatic File Transfer Protocol (FTP) access. Initiate synchronization process manually, at any time.

Requirements. Convio Constituent360™ online database and associated Convio online solutions are required to use Convio DataSync. Also required: An offline database with mechanism for data import and export, and high-speed connectivity between the user, Convio and offline database(s).
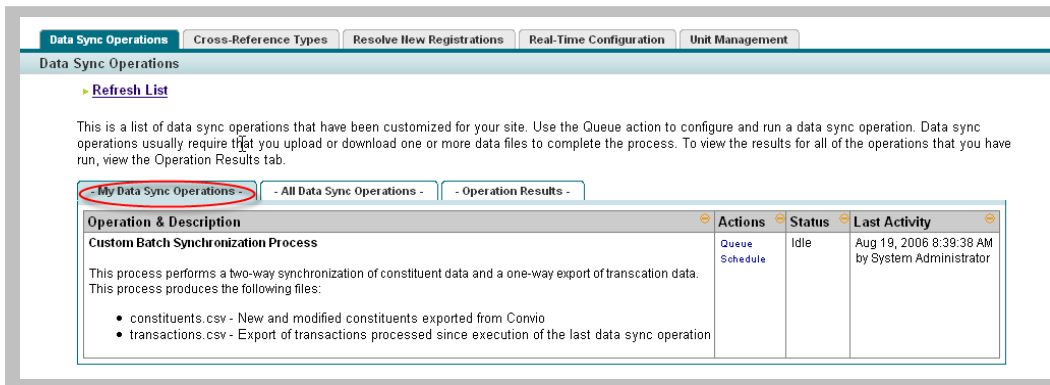

Figure 1. The "My DataSync" Tab isolates the synchronization functions
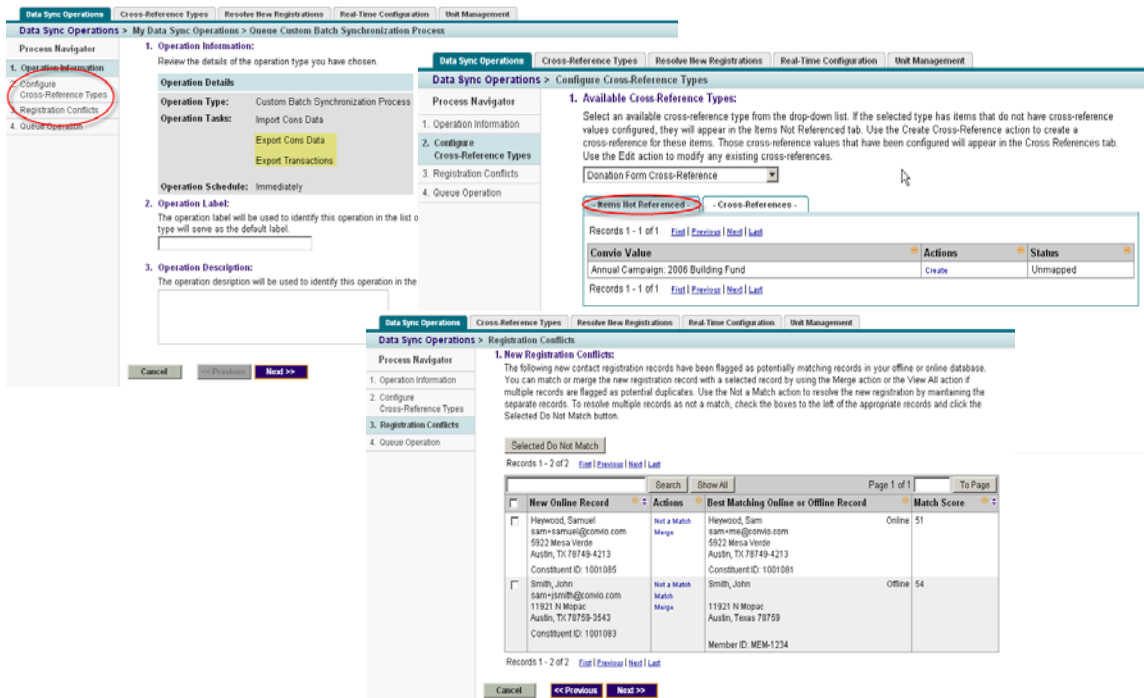that are used frequently by your organization.

Figure 2. A DataSync wizard walks you through a sequential series
of synchronization steps that are particular to your custom integration.

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