Our Flexible Friends:
Using Convio S Tags and Conditional Content to Boost Your Fundraising Strategy

Guest Speakers:
Liz Nielsen  Online Fundraising Manager, Feeding America
Brenda Miele  Director of IT Projects, Event 360
Meet the Presenters

- Ken Cantu
  Team Lead, Program Management Services

- Taylor Shanklin
  Implementation Specialist, Program Management Services

- Liz Nielsen
  Online Fundraising Manager, Feeding America

- Brenda Miele
  Director, IT Projects, Event 360

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Feeding America

Event 360
This presentation is about inspiration and expanding what you know is possible with the tools.

This is not a code tutorial.

Leave here with:
- Ideas ideas ideas!
- The resources for you to make those ideas happen.
Agenda

- Overview of the tools
- There is an S Tag for that?!
- Taking it to a larger scale – Feeding America: Creative online projects
- What about events? – Event 360: Using Convio Conditionals in Events
- Wrap Up
Overview of the Tools

Ken Cantu
Overview of the Tools

- **S Tags**
  - Short snippets of code
  - Portal to the Convio database
  - Key to displaying user, server information
  - Unique to the Convio System

  - [[S#:parameter]]
  - `<convio:session title="#:parameter" name="#" param="parameter"></convio:session>`
  - EX: `[[S1:first_name]]`
Conditionals

- Logic phrases that tell the system how, when, and under what circumstances to display information.
- Work in conjunction with S Tags
- Unique to the Convio system

- If $X = (or
contains) Y$ then show $A$ else show $B$

- EX:
  
  ```
  [[?[[S45:1000]]::TRUE::
  You are in this group::You are not in this group]]
  ```
Overview of the Tools cont.

- Convio Open API’s
  - Way to ask for information in Convio, return that information, and then use it to create outside of the constraints of a platform.
  - Events
  - Donations
  - TeamRaiser
  - Constituent Information
  - Address Book

- http://open.convio.com/
There’s an S Tag for that?!!

Taylor and Ken
There’s a S Tag for that?!

- **S98**: Returns days, months or years between today and a given date in the future
  - Only how many shopping days until Christmas?!
- **S58**: Renders an email message
  - Create an archive page of Newsletters!
- **S55**: Random number generator
  - I’m no Javascript guru but I can now create a picture rotator!
- **S49**: Returns a receipt request if PDF receipts are enabled (SDP)
  - Constituents can request a PDF of their transactions in Convio!
- **S50**: Can return browser identification information or referring URL to the current page
  - Let’s show some conditionalized content to those people coming from our Partner’s website!
There’s a S Tag for that?!

- **S95**: Creates discount code input field
  - Honor special donors with a ticketed event discount!
    (not in S Tag document but we put an example in Summit CD code snippets)

- **S337**: Renders a widget performance thermometer
  - Expanded use: thermometers for Events and Ecommerce!

- **S188**: Displays same dynamic ask functionality as donations 2 giving levels
  - Pre-populate email donate links with amount based on previous giving history!

- **S356 & S364**: Add 1 YouTube video a whole video bar
  - Conditionalize which video you want to show a user!

- **S361,2,3,5,6**: Renders Facebook Connect components
  - Ability to share with 300+ million active users? Yes please!
Summary

- Always new and interesting S Tags to play with.

- S Tags by themselves are very powerful and a great way to start making things dynamic.

- Conditionals based on user history along with S Tags can make stronger connections.

- Questions?
Feeding America

- Feeding America is the nation's leading domestic hunger-relief charity.
  
  - Our network of more than 200 food banks provides food to more than 25 million annually, including more than 9 million children and nearly 3 million seniors.

  - Collectively we secure and distribute more than 2.5 billion pounds of food and grocery products annually.
Objective: Focus on the Donor

Objective:
- Increase revenue by improving Donor Experience

Tactics:
- Map donor experience to understand all touches
- Message integration cross-channel
- Offer increased donor choice
- Use analytics to identify key behavior moments (recruitment into planned giving and monthly giving)
Who Are We Talking To?

- Defined 7 key segments online based on donor status
  1. Offline Active Donor (with email)
  2. Offline Lapsed Donor (with email)
  3. Online Active Donor
  4. Online Lapsed Donor
  5. Dual Channel Active Donor
  6. Dual Channel Lapsed Donor
  7. Non-donor (with email)

- Within segments there are obviously different levels of engagement – advocates, monthly donors, multi-donors, volunteers, etc.

- Working toward providing the optimum experience, but this is our start.
EXAMPLES
My Community Center: feedingamerica.org

- Featured on utility navigation
- Current:
  - View YTD and online/offline prior year giving
  - Update contact info
  - Manage email subscriptions
  - View relevant donor content
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Chicago, IL 60647-1836
7732762765

Update My Profile | Sign-Out

YOUR EMAIL INTERESTS
• Advocacy
• E-alerts
• Newsletters
• Urgent News Alerts
Update My Email Communications

YOUR ONLINE GIVING HISTORY
Most Recent Online Gift: $15.00 on Nov 6, 2009
Year-to-Date Online Giving: $20.21
2008 Giving Record

Are you a Feeding America fan?
Join our Facebook page and encourage your friends to do the same.
Become a fan today!

Feed hungry children this weekend!
When school is out, many poor children are forced to skip meals. But friends like you are helping fill backpacks with non-perishable, vitamin-fortified food that children can take home on weekends. Please help us reach 50,000 children. Every $1 you provide $14 worth of groceries. That’s 9 pounds of food! Please give now.
My Community Center: feedingamerica.org

- Future:
  - Total Meals
  - Monthly giving self service
  - Participant center
  - Custom content based on interests
  - Integration with CMS and Advocacy
Tax Statement Appeal: Emails

Non Donor, Lapsed 24+

Lapsed 12+

2008 Donors
Integrated Campaign
   - Direct mail
   - Email

Custom fields for annual 2008 giving amt/date

Provides cum 2008 giving as well as cum for 2 prior yrs.

Evergreen feature in My Community Center
Summary

- We’re always thinking about donor experience and maximizing the relationship with Feeding America

- Critical to think about the desired actions you want to see results from using conditional content
  - Non-donor to donor
  - Donor to multi-donor or monthly donor
  - Advocate to donor
Questions?
Using Convio Conditionals in Events

Brenda Miele, Director, IT Projects, Event 360
Let's Talk Events!

- Taking your Autoresponders to the Next Level
- Logging In and Keeping Them Interested
- Pizzazzz to the Wrapper
- Participant Only Content Conditionals
- Fun with C-Tags, S-Tags and Groups in the Participant Center
- Q&A
Taking your Autoresponders to the Next Level

- First communication to your new event participants – make it stand out!
  - Your call to action: Fundraising and Recruiting

- Using Conditionals to Connect and Engage
  - You can adjust your messaging and hit home with more participants
    - Segmentation Ideas:
      - Team Captains
      - Team Members
      - Participation Type

- Use the S1 & S48!
  - Make Convio do the work and input date, event name, team names, passwords…you get the idea.
Taking your Autoresponders to the Next Level

- Remind them what their username / password is in all autoresponders. (S1)
Taking your Autoresponders to the Next Level

- Entice them with links and specific content (S48)

Registration Type = CREW

Registration Type = WALKER
Logging In and Keeping Them Interested

- Getting participants to log in – make it easy!
  - Always put Participant Center link in a consistent spot
  - Use the S8 to bring them back to the same page
  - Always have the “Forgot Password” link to prompt the system and keep it easy for them to gain access.
  - Let them know about their “Participants Only” section. This content should entice them to want to log in and find out more details!
Logging In and Keeping Them Interested

- Make a “Landing Page” just for their events
  - One place to see all Participant Centers. Easy to get back to their “home”.
  - Use S1 to see if logged in or not.
  - Convio does all the work with the S39.
  - Quick “Help” link in case of issues.
Logging In and Keeping Them Interested

What Can the S39 Do For You?

- Show all Participant Centers – across your entire site – in one area
- Can be configured to display participant centers by registered events, fiscal year, type, etc.
- Don’t know code? No worries! It’s a component in PageBuilder.

To enter a Participant Center: Select a pink event link below.

You are registered for these events:

- 2009 San Diego Breast Cancer 3-Day
- 2010 Susan G. Komen San Diego 3-Day for the Cure

November 20 - 22, 2009
November 19 - 21, 2010

If you do not see any event(s) listed above, it is probably because you are not registered for a 3-Day.

If you are having difficulty navigating our site, please make sure you disable any pop-up blocker in your internet browser. Check the Options section of your browser and delete temporary files and cookies, restart your browser and continue.
Pizzazz to the Wrapper

- Using Session Tags, you can:
  - Brand one wrapper with Event Name
  - Example: National Kidney Foundation Affiliate Walks
Pizzazz to the Wrapper

- Using Session Tags, you can:
  - Have specific components based on TRID (S80)
  - Example: Autism Society – Ticket to Ride
Pizzazz to the Wrapper

Using Session Tags, you can:

- Remove navigation when making a donation
- Example: The Breast Cancer 3-Day (now the Susan G. Komen 3-Day for the Cure)
Special content just for your participants!

“Members Only” – you have to be registered as a participant to see specific content

What are they doing on the site?
- Looking at interactions on the site and customizing messaging.

So…How Do You Do That?
- Session Tags are your friend
- Security Categories (Registered Users)
- Queries, Groups and Interests…Oh MY!
  - S45 for Groups, S1 for Interests
Participant Only Content Conditionals

- Special content just for your participants!
  - Example: Breast Cancer 3-Day
Fun with Tags in the Participant Center

- The Participant Center – Endless Possibilities!
  - C-Tags
    - Simplify your set up – use text fields to store repeated content (example: email, coordinator name, etc.)
    - Use C1 tag to populate field data
Fun with Tags in the Participant Center

The Participant Center – Endless Possibilities!

- Use S-tags to populate important details for the participants:
  - Days Until Event
  - Participation Type
  - Fundraising
  - Render lists of TeamRaiser Participants, Teams, or Gifts (S36)
  - On a Team or Not (and what the team name is)
Welcome to your Participant Center!

**Your Donation Form**

Registered for more than one Breast Cancer 3-Day in 2009? [Click here](#) to select which Participant Center to view.

[Click here](#) to go to your 2010 Susan G. Komen 3-Day for the Cure Participant Center.

**Online Check-in:** You have completed online check-in and you have declined a tent assignment. Please [click here](#) to print out your confirmation page.

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### Welcome to your Participant Center!

**Denver Crew Superstar Fundraisers**

Learn more about how to fundraise using your Participant Center and you could see your name "up in lights" soon!

<table>
<thead>
<tr>
<th>Top Crew Fundraisers:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Molly Fast</td>
<td>$3707.22</td>
</tr>
<tr>
<td>Sharon Bishop</td>
<td>$3335.00</td>
</tr>
<tr>
<td>Carl Bloom</td>
<td>$2400.00</td>
</tr>
<tr>
<td>Wendie Olshan</td>
<td>$2027.00</td>
</tr>
<tr>
<td>Nancy Brown</td>
<td>$2000.00</td>
</tr>
</tbody>
</table>

**Power Crew Team:**

- Pit Stop 4

(All stats as of 08/23/2009)

**Your Crew Team Assignment:** Pit Stop 4

[The August News is now posted](#). Check out the links to the left to read more.
Fun with Tags in the Participant Center

Other Things to Consider

- Navigation that is specific to your Participant Center
  - Participant Message Boards
  - Resources
  - Widgets

- Checking on email communication – are they opted out and not know it?

- Sponsor information

- Links to downloadable donation forms
Q&A / About Event 360

- Event 360 is the industry leader in creating fundraising, advocacy and awareness events for nonprofits

- Our Services
  - Event Production
  - Consulting
  - IT Consulting

- Contact us
  - Jono Smith
    VP, Sales & Marketing
    Mobile: 202.236.1079
    jsmith@event360.com

your mission is our passion.
Questions?
Wrap Up

Taylor Shanklin and Ken Cantu
Wrap Up

■ Lots of functionality to get creative with.

■ Work into all areas of your online fundraising efforts from small campaigns, to large projects, to your key events throughout the year.

■ You can do it and we are here to help!
Resources to help you along the way

- Code snippets on Summit CD
- Convio S Tag and Conditional Document
- How to construct S Tags and Conditional Summit 2008 Presentation
- Expert, Demo and Usability Labs
- Convio Community (Free!)
- Retained Services ($)
- Convio Open http://open.convio.com
Thank You

- Special thanks to Liz and Brenda!
- We’ll stay around for any follow-up questions you might have.
- We look forward to seeing what you create!

Ken & Taylor

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Text **CNV149** to **30644** to take a quick survey about this session.

Don’t forget to visit the Expert Lab!