

We'll be starting shortly...

COMMON GROUND TRANSITION OPTIONS

October 9, 2012



> INTRODUCTIONS & AGENDA

Hosts:

- Rachel English, Director of Common Ground Programs
- Stacie Allred, Common Ground Program Manager
- Rana Kahl, Director of Alliances
- Kate Harwood, Manager of Partner Operations

Agenda:

- Special Offers for Common Ground Clients
- Contract Changes for Common Ground Clients
- Sharing Client Disposition Information
- Coordinating Client Calls
- Resources Coming Soon
- Questions?

SPECIAL OFFERS FOR COMMON GROUND CLIENTS

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ETAPESTRY

- By no later than December 31, 2013, Common Ground clients may elect to transition to <u>eTapestry Essentials or Pro</u> and sign a new 2- or 3-year contract for less than or equal to the monthly price they were paying for Common Ground.
- If the monthly price for the eTapestry package selected is less than the price the client was paying for Common Ground, the client's account will be credited for the difference on a prorated basis.
- There will be a 5% cap on contract rate renewals. eTapestry contract renewal terms are 1-year.
- Migration services will be delivered by Blackbaud at no additional cost, including: kick-off, discovery, data conversion, implementation consulting, system customization, online configuration (if applicable), and go-live.
- eTapestry offers <u>online documentation</u> and recorded online training.
- Email and chat support are included. Phone support can be added for an additional fee.

> THE RAISER'S EDGE(/)

- By no later than December 31, 2013, Common Ground clients may elect to transition to <u>The Raiser's Edge(i)</u> and sign a new 3-year contract for the same monthly price they were paying for Common Ground.
- The specific package available as part of this transition includes all elements indicated in the "The Raiser's Edge(*i*)" column described <u>here</u>. It also includes the "optional" add-ons for Membership Programs, Event Management, and Volunteer Management.
- There will be a 5% cap on contract rate renewals. The Raiser's Edge contract renewal terms are 3-year.
- Migration services will be delivered by Blackbaud at no additional cost, including: kick-off, discovery, data conversion, implementation consulting, system customization, online configuration (if applicable), and go-live.
- The Raiser's Edge offers <u>online documentation</u> and <u>recorded online training</u>. Additional <u>training options</u> are available for purchase.
- Online and phone support are included.

> LUMINATE CRM

- By no later than December 31, 2013, Common Ground clients may elect to transition to <u>Luminate CRM</u>. Pricing for this option will be quoted on request.
- In most cases, the migration from Common Ground to Luminate CRM necessitates re-implementation in a new Salesforce instance, and requires a transfer of the organization's Salesforce Nonprofit Product Donation (if applicable).
- If client selects Luminate CRM and had been engaged with a CSP for a Common Ground implementation that was not yet started or was in progress, client is encouraged to continue with CSP and shift the project to Luminate CRM implementation.
- If client selects Luminate CRM and had previously completed Common Ground implementation, migration services will be delivered by Blackbaud at no additional cost.
- Luminate CRM offers online documentation and recorded online training.
- Online and phone support are included.
- Documentation on the differences between Common Ground and Luminate CRM will be available soon.

> CONTRACT CHANGES FOR COMMON GROUND CLIENTS

CONTRACT CHANGES FOR COMMON GROUND CLIENTS







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> RENEWAL

- By no later than December 31, 2013, Common Ground clients may elect to renew their Common Ground contract, as long as the new term expiration is not past March 31, 2014.
- Non-standard renewal terms will be allowed, at a minimum of three months and in monthly increments.
- After renewal, a client may elect to terminate their Common Ground contract prior to the stated term expiration, with no penalty.
- To terminate their renewed contract prior to the term expiration date, the client must request contract termination in writing by sending an email to <u>cgtransition@blackbaud.com</u> two weeks or more in advance of the requested termination effective date.

> NON-RENEWAL

- Common Ground clients may elect not to renew their Common Ground contract when the term reaches expiration.
- The client must request contract non-renewal in writing by sending an email to <u>cgtransition@blackbaud.com</u> 30 days or more in advance of their term expiration date.
- Access to all Common Ground functionality within the organization's Salesforce instance will be suspended on the term expiration date.
- If the Common Ground contract included Common Ground Fundraising, all associated online forms will be deactivated and recurring transactions will be ceased on the term expiration date.

EARLY TERMINATION

- Common Ground clients may elect to terminate their Common Ground contract prior to the stated term expiration, with no penalty.
- The client must request contract termination in writing by sending an email to <u>cgtransition@blackbaud.com</u> two weeks or more in advance of the requested termination effective date.
- When the request is received, the client will be sent an Early Termination contract amendment for signature.
- Access to all Common Ground functionality within the organization's Salesforce instance will be suspended on the effective date of the Early Termination amendment or when the termination is processed, whichever is later.
- If the Common Ground contract included Common Ground Fundraising, all associated online forms will be deactivated and recurring transactions will be ceased on the effective date of the Early Termination amendment or when the termination is processed, whichever is later.
- If client has pre-paid any Common Ground license fees for periods after the early termination effective date, those fees will be refunded when the termination is processed.

SHARING CLIENT DISPOSITION INFORMATION

NEW FIELDS IN PARTNER PORTAL

Opportunity Detail

Edit

Account Name	Life Is Good Kids Foundation
Client Account Manager	CG Programs
Opportunity Name	Life Is Good Kids Foundation - CG Implementation
Opportunity Record Type	Partner Deal
Business Unit	GMBU
Client Service Tier 🥹	Mid-Market
Related Convio Sales Opportunity 🥹	W2G - Life is Good Kids Foundation-CG
Type of Partner Service 📀	Common Ground Implementation
Types of Partner Applications	Common Ground
Sent Partner Survey	
CG Edition	MidMarket

Close Date	7/2/2012
Stage	Closed Won
Probability (%)	100%
Convio Recommended CRM Path 🥝	
Partner Recommended CRM Path	
Partner CRM Path Notes	
Client Selected CRM Path 🥥	Migrate to Luminate CRM (CG)

Opportunity Edit

Save Cancel

Account Name Life Is Good Kids Foundation
Opportunity Name
Opportunity Record Type
Related Convio Sales Opportunity ② W2G - Life is Good Kids Foundation-CG
Type of Partner Service ③ Common Ground Implementation

Close Date 7/2/2012 [10/9/2012] Stage Closed Won
Probability (%) 100
Partner Recommended CRM Path
Partner CRM Path Notes

Types of Partner Applications Opportunity Currency

ns Common Ground

Sent Partner Survey

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NEW REPORT IN PARTNER PORTAL

Home Opportunities Reports Partner Help								
Partner Portal Quicklinks	Reports Home							
Community Customer Center	Enter keywords to find matching custom reports. Find Report							
Folder Go!								
	All Reports Recent Reports							
	 Partner Users Export Common Ground Clients Implemented – Shows all your Common Ground clients you have implemented, details about their path forward Export Deal Registrations/Leads Entered – Shows all draft or submitted Deal Registrations. These will be converted by The Partner Ops team into a Project after they are submitted, will no longer be able to see them in this report - they are moved to your project reports. Export Projects - Completed – Projects that have been completed by a partner Export Projects - In Progress & On Hold – These are partner projects that are in progress Export Projects At Risk – Partner Projects that are in Yellow or Red status 							

Opportunity Name	<u>CG</u> Edition	<u>Client Selected</u> CRM Path	<u>Convio Recommended</u> <u>CRM Path</u>	Partner Recommended CRM Path	<u>Business</u> <u>Unit</u>	<u>Close</u> Date	<u>Status</u>	<u>Partner</u> Project Lead
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COORDINATING CLIENT CALLS

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> NEW TOOL FOR COORDINATING CALLS

- Working with our IT team to enable <u>Cloud Scheduler</u> in our Salesforce instance.
- Once enabled, Common Ground Transition Account Executives can initiate call requests to include both partner and client, find times that work for all three parties, and schedule the calls.
- Plan to schedule joint calls for all Common Ground clients who had been engaged with a CSP for a Common Ground implementation that was not yet started, in progress, or on hold.

> RESOURCES COMING SOON

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- Documentation on the differences between Common Ground and Luminate CRM
- Documentation on exporting data out of Salesforce / Common Ground (available now!)
- Documentation on uninstalling the Common Ground package
- Ability to schedule client/partner/transition team calls via Cloud Scheduler

> QUESTIONS?

Now, or email <u>cgtransition@blackbaud.com</u> any time!

Or contact Rachel English at (512) 652-7953 or rachel.english@blackbaud.com.

> THANK YOU!