Common Ground Implementation Guide

Prepared for Convio Solution Providers

Prepared by Kate Merriman, Common Ground Implementation Manager

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Overview

This is a high-level guide for understanding the flow and basic processes for a Common Ground implementation. Detailed instruction for implementing specific features of Common Ground, performing data migration and other in-depth topics can be found in the Partner LearnCenter.

Scoping Implementation

Common Ground (CG) implementation is first addressed with the client in the sales cycle. The Convio Account Executive (AE) will do a high level assessment of their implementation needs including budget, timeline, and goals. Then the AE will bring in a Convio Solution Provider for Common Ground to fully scope the project. The following items should be considered during the scoping process and addressed by the Partner:

First, the Partner should ask the client if they have an existing instance of Salesforce. If they do there will be implications on the scope of the project, possibly from multiple standpoints. Please read the document posted on the Common Ground Partner Community regarding how this can impact the scope of a project: When Your Prospect Has an Existing Product Donation.

SCOPING FOR CONFIGURATION AND CUSTOMIZATION

Most projects will require some level of configuration or customization within Common Ground. The following are all possible and should be discussed with the client during the scoping process:

- Customization of existing field picklist values
- Build out of items custom to each client, for example:
  - Campaigns
  - Designations
  - Relationship Types
  - Reports & Dashboards
- Additional features around CG - functionality to help client's programs i.e. Membership
- Changes to page layouts
- Workflow rules & triggers
- Apex coding

SCOPING FOR DATA MIGRATION & INTEGRATION

Partners will need to understand what the client's data source(s) are and needs around data integration with other systems. The following should be discussed as a part of the scope:

- Data collection from legacy system(s)
- Data hygiene (de-dupe) between multiple legacy systems
- Prepping data for load into CG
- Loading data into CG - sometimes just once, or sometimes test conversion first and then final conversion
- Audit of data once in CG
- Performing additional data hygiene within CG if needed

With any prospective client proposing to bring in 65,000 or more contacts and 130,000 donation records, a full investigation of potential storage needs from Salesforce will need to be assessed as part of the sales cycle.

Clients may also have data integration requirements that will need to be scoped. Some of the most common requests are accounting systems, like QuickBooks or Sage, but there can be other integration needs.

Clients may also want to add other Salesforce applications to their instance. More information about integrations can be found in the "Useful Apps" forum in Common Ground Resource Center.

SCOPING FOR TRAINING & DOCUMENTATION

Most CG implementations will include a training component in which Partner demonstrates product functionality specific to client's fully implemented instance with customizations in place and data loaded.

We have noticed that clients can learn more effectively when viewing their own data, and interacting in their own instance with the configuration they will be using.

If including Documentation in your project scope, it should be limited to the client-specific customizations. Convio provides field-by-field help, "how to…" documents, and release notes to our clients free of charge via the Common Ground Resource Center.

SCOPING FOR SUPPORT

If you are including support in your implementation agreement, it typically will be post-project for any items that come up after 2-4 weeks of CG usage. Convio provides ongoing Support to our clients included in their usage. You can create an ongoing Support arrangement with client separately if you wish.

Contract Process

After the scoping is completed, and is presented to the client, the following steps will occur:

1. Client signs Partner's implementation contract.
2. Client signs Convio's software contract.
3. Client secures Salesforce product donation (Convio guides the client through this process).
4. Convio activates CG licenses.

Implementation Process

Generally, Convio does not dictate how you run your Common Ground Implementation projects. We understand that different Partners will have their own methodologies.

Convio does track all projects with each Common Ground Partner via the Partner Portal.

PLANNING PHASE

At this phase of the project, you should first be receiving hand-off from your sales team about the client's expectations of their project.

1. Obtain access to the client's Common Ground instance

Typically a client will be starting with a new instance of Common Ground that is created during their Welcome Call held within 10 days of deal close. Occasionally, the client already has an existing instance of Salesforce with donated licenses: this should have been uncovered in the sales process. (Again, please read: When Your Prospect Has an Existing Product Donation.)

Ask the client for access to their CG instance by creating a new user for you and assigning one of their CG licenses to you for the duration of the project. When the implementation project is completed, instruct the client to remove the license from your user and assign the license(s) back to their own user(s) in order to close out partner access. Convio does not grant the partner an additional license to use through the project.

2. Confirm requirements and timeline with client

Next you will be meeting with the client in regards to their specific requirements and to build out their timeline. Once a general timeline of the project is known, this should be communicated to the Common Ground Implementation Manager via the Partner Portal.

3. Review process for communicating and billing

Make sure your client knows how and when you will be working together. If you have a Time & Materials contract, make sure your contact at the client is clear about those terms. If possible, update the client regularly about how many hours have been consumed so that there are no unhappy surprises later.

4. Update the Convio Partner Portal with project status

When you make updates to your Common Ground Implementation Projects via the Partner Portal, please base the "Est. Project End" date and the "Project End" date on the donor database project.

Additional work configuring online forms or providing support or training work might go on past the date when the client users “launch” with Common Ground. Typically, the database implementation project is considered completed when client can begin using Common Ground as their database of record.

(As a corollary, if you implement Common Ground Fundraising and/or Common Ground Social prior to a data migration project you will subsequently be doing for them, please do NOT close out the Implementation Opportunity when you finish the CGF or Social piece, but wait until Common Ground is launched as the client's donor database of record.)

To recap, here are the status fields in the Implementation Opportunity and what we expect to see in each:

- Partner Project Phase - choices are "Plan", "Discovery and Design", "Implement", "Launch" and "Project Completed". Please choose the correct phase for the Common Ground donor database project.
- Status - choices are "Not Started", "On Hold (by client)", "On Hold (by partner)", "Engagement Completed" and "Pending Connector". For Common Ground projects, you can ignore the "Pending Connector" status. Choose the appropriate status for what is occurring on your Common Ground donor database project.
- Status Notes - tell us what's pertinent, especially around risks or holds or if you'd like us to take action
- Project Start - enter the date you started your Common Ground donor database project.
- Est. Project End - enter the date you estimate you will complete your client's Common Ground donor database project
- Go Live Date - you can ignore this for Common Ground projects
- Project End - Leave this blank until you complete the donor database project, then update this field with the date you actually completed the project.
- Last Updated - manually update this to the date you are making your update (give yourself credit for giving an update - not automatically updated!)

DESIGN PHASE

During this phase you will be conceiving the detailed solution for the client's Common Ground, taking into consideration their data migration and integration requirements, customization requests and other items that surfaced during discovery with the client.

IMPLEMENTATION PHASE

This phase of the project is focused on configuration of the client's system to their specifications and data migration and integration, if required. Once this phase in the project is reached, it should be communicated along with any timeline changes to the Common Ground Implementation Manager via the Partner Portal.

Customization & Configuration

Some Common Ground implementation projects may involve customization of the client's CG instance to accommodate business process needs surfaced in discovery. This type of work generally takes place prior to data migration and could include:

- Customization of existing field picklist values
- Build out of items custom to each client, for example:
  - Campaigns
  - Designations
  - Relationship Types
  - Reports & Dashboards
- Additional features around CG - functionality to help client's programs i.e. Membership
- Changes to page layouts
- Workflow rules & triggers
- Apex coding

Data Migration & Integration

The following steps are generally required for a client's data migration:

- Data collection from legacy system(s)
- Data hygiene (de-dupe) between multiple legacy systems

- Prepping data for load into CG
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Convio offers a well-understood method for data migration for partners and this is covered in recorded trainings in the Partner LearnCenter.

Launch Phase

During this phase of the project you will be guiding the client through training on their new system (if included in the scope of their agreement) and ensuring they are up and running on Common Ground. Once this phase in the project is reached, this should be communicated to the Common Ground Implementation Manager via the Partner Portal.

Training

If your project scope includes training, you will demonstrate product functionality specific to client's fully implemented instance with customizations in place and data loaded.

Please note that there are many live product training courses available free of charge from Convio to Common Ground licensed users. The full list and description of classes is found in the Resource Center tab in Common Ground under "Training Center."

Documentation

It is generally recommended to document items you have done throughout the project in relation to the client's configuration. This may include items built outside core Common Ground functionality that support a function of the client's organization. This will serve as reference to them as they continue to use the system.

Support

Clients are offered access to Convio Support (included as a part of their license fees) throughout their contract. If time allows on your project, however, you may want to allow a few hours in your contract with the client so they can come back to you with any questions related to configuration of their system.

Project Completion

Once your project is done, you should confirm completion of your project with your client, having them sign-off on any necessary documents that ensure the project was performed and completed to their satisfaction.

Project completion should be communicated to the Common Ground Implementation Manager via the Partner Portal.

If you have any questions about Scoping or Implementation Processes please contact the Common Ground Implementation Manager, Kate Merriman, at kmerriman@convio.com