



# Feature Summary: Constituent360™ Olympus Enhancements

## Module: Constituent360™

Release: Fall 2010

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### New Terms or Concepts

**No Preference** – although not an entirely new concept, this term (as used in this Feature Summary) refers to the fact that a constituent has neither indicated an interest in a certain topic nor indicated that they specifically do not wish to receive email on a certain topic. It can be important to distinguish between No Preference and definitely Not Interested -- since the latter constituents are placed in the Opted-Out Group for an Interest and often become part of the Do Not Email audience for messages.

### Overview

Constituent360™ Olympus Enhancements provide two new feature capabilities for admin access and management of Constituent360™ data in Convio Online Marketing (COM).

First, MultiCenter Center-level administrators will be able to access Site-wide Groups when formulating queries, creating Report Writer filters, or creating conditional content based on Group membership.

Second, all client administrators will be able to set a constituent's preference for any email interest to a new option called "No Preference".

### Key Features & Benefits

Feature	Description	Benefit
Share Groups Across Centers	<p>When this feature is enabled, Center-Level administrators will have access to all Site Groups in the following areas of Convio Online Marketing (COM).</p> <ul style="list-style-type: none"><li>• Query: Group Clause Selector</li><li>• Report Writer Filters: Group Membership Filter</li><li>• COM WYSIWYG Editor: Group Conditional Selector</li></ul>	<p>Center-level administrators for MultiCenter clients will enjoy the following benefits:</p> <ul style="list-style-type: none"><li>• Save time by reusing work done by other Site or Center Admins to create Groups to segment constituents. (see UC1 below for specific example)</li><li>• Improve consistency of segmenting constituents by using the same Groups that other Center and Site Admins use.</li><li>• Maintain high security by continuing to limit Center Admin access to constituent data they are not permitted to see.</li><li>• Provide a more engaging and personalized experience for website visitors with the ability</li></ul>

### “No Preference” for Administrator Email Interest Management

Provides an improved administrator interface in Constituent360™ for selecting a constituent’s Interest preference as “No Preference” instead of forcing the administrator to select interested or not interested.

to create conditional content based on any Group on your Convio Site. (see UC2 below for specific example)

- Easier user interface for administrators to manage C360™ Interests.
- Eliminate unintended constituent opt-outs. The new admin interface prevents administrators from inadvertently opting-out constituents when updating email preferences. It was possible in the old interface (before Fall 2010) for an admin to unknowingly change a constituent’s Interest preference from “No Preference” to “Opt-Out”.

## Use Scenarios

### UC1: Center Admin segments constituents based on Site-wide Group

The American Health Society (AHS) maintains a set of Site-wide Groups (not specific to any center) to indicate special constituents they call “Super Constituents”. Super Constituents are individuals highly engaged with the organization, either in terms of outstanding generosity in making online donations, or activism in online advocacy. American Health Society has a brand policy of engaging Super Constituents in special ways across their entire affiliate network and it is important for all affiliates to be able to easily and consistently identify Super Constituents. To do this, in Convio AHS has set up a set of recurring Queries that identify these constituents – one in particular runs daily on lifetime online transaction history to maintain a Group called “AHS Super Donors” – these are Super Constituents who have donated over \$1,000 online with AHS (across any affiliate).

Ryan, an administrator for the Austin Health Society (a local affiliate of AHS) wants to identify the members of his Center (the AHS Austin Center) who are also “AHS Super Donors.” Ryan logs into COM (as a Center Admin), navigates to Query, and is able to create queries based on any Group on his COM Site. He selects the “AHS Super Donors” group specifically and is able to find all constituents in his Center, who are also a member of this group.

### UC2: Center Admin creates conditional content based on Site-wide Group

In addition to building a Query based on “AHS Super Donors”, Ryan with the Austin Health Society would also like to create special content greeting AHS Super Donors on his Center Homepage, which he’s built using PageBuilder. To do this, he logs into PageBuilder and edits his homepage. Ryan uses the Conditional Group Selector of the HTML Editor Component in PageBuilder and creates a paragraph of content specific for “AHS Super Donors”.

## Considerations for Clients (formerly Impacts Section)

- Since the “Share Groups Across Centers” feature behaves in the same manner as the “Share ‘Do Not Target’ Groups” feature from the Convio Summer 2010 release, the same Site Data Parameter (SDP) is being reused to control this new feature. As part of reusing this SDP, please note, that the name of this SDP has changed in the Fall 2010 release from “EMAIL\_GROUP\_SHOW\_ALL” to “GROUP\_SELECTOR\_SHOW\_ALL\_IN\_CENTER\_MODE” to reflect its broader level of control.
- All clients will have access to the “No Preference” for Administrator Email Interest Management feature.

## Feature Configuration

Clients can add the ability for Center Admins to access site-wide groups as follows:

- If you are already using the EMAIL\_GROUP\_SHOW\_ALL site option to make all site groups available to your Center admins when they select the Do Not Email segment for email messages, then the newer GROUP\_SELECTOR\_SHOW\_ALL\_IN\_CENTER\_MODE site option will automatically be enabled for you when you are upgraded with this release. Your Center Admins will then be able to access site-wide groups when:
  - Selecting the Do Not Email segment for email messages
  - Using the Groups clause while constructing a Query

- Working with Report Writer reports that have the Group Membership filter (such as the Center Members report)
  - Using the WYSIWYG Editor Conditional selector for Groups (is in group, is not in group)
- If you do **not** currently use the EMAIL\_GROUP\_SHOW\_ALL site option but would like to use the new GROUP\_SELECTOR\_SHOW\_ALL\_IN\_CENTER\_MODE site option, you must contact Convio Support to enable this option. Once enabled, your Center Admins will have access to site-wide groups in the same areas mentioned above.

The ability to set a constituent's preference for any email interest to a new option called "No Preference" does not require any site configuration. This feature will automatically be available to all administrators when they edit a constituent's Email Interests on the Email Preferences tab in the constituent profile.

### Limitations and Out of Scope Features

- The "No Preference" option has not yet been added to Administrator Web Interest management.
- The "No Preference" option has not yet been added to constituent facing pages. Neither the Email Opt-Out Page (commonly referred to as the "CO Page") nor the constituent-facing interest management pages have been updated to display an option for constituents to select "No Preference".

### Screen Shots

The following screen shots help to illustrate the new features in Constituent360 for this release:

- The first screen shot below shows the Query Group Selector Clause (in Center mode). With the new site option enabled, the Austin AHS Center administrator is able to see and select groups from across the site:

**Group Phrase Type**

This allows you to include or exclude contacts based on their membership in the selected group.

Include contacts that are

Group Type	Special	Selected
Districts		
County Residents		
Directory Groups		
Email Test Groups		
Site Admins		
Special	<input checked="" type="checkbox"/> AHS Super Donors	<input checked="" type="checkbox"/> AHS Super Donors
State House Districts		
State Residents		
State Senate Districts		
Survey Groups		

The resulting query will return any center members who are also members of the site-wide AHS Super Donors group:

**Query**

Query List Query Info **Query Builder** Results

**AHS Super Donors**

**Query Details**

Field Type: Address Field: Accepts Postal

Add Field Clause

Add Group Clause

Add an Interaction Clause

Add Center Opt-in Clause

a member of 'AHS Super Donors' group

Change

Remove

And Or

( )

2. The following two screen shots illustrate the before and after versions of the Email Preferences editing page for each constituent (admin view):
- This first screen shows a Constituent360 Email Preferences editing page (admin-view) prior to this release. (Note that each Email Interest has only two states: checked (subscribed) or unchecked (unsubscribed))

**Change Site-wide Email Preferences for Jack Brown (1001001)**

☒ Yes, opt this constituent into site-wide email

☐ No, opt this constituent out of site-wide email

Preferred Format:

I would like to receive email about the following selected topics:

☒ Expand All ☐ Collapse All

Email Interests	Description
<input type="checkbox"/> Education	top-level email interest for those interested in our education efforts
<input type="checkbox"/> Newsletter	for those interested in our newsletter
<input type="checkbox"/> Workshops	for members who are interested in attending workshops
<input checked="" type="checkbox"/> Research	email interest for those constituents who are interested in our research efforts

**Save** or [Cancel](#)

- The next screen shows the new Constituent360 Email Preferences editing page (admin-view) as it has been redesigned for the Fall 2010 release. Note that the new version permits the administrator to select from 3 states: Subscribed, Unsubscribed, or blank (indicating No Preference). In addition, the administrator can now reset an Interest from Unsubscribed to blank (for No Preference), which will remove the constituent from the Opt-Out group (provided the interest is not a default interest for the site).

Change Site-wide Email Preferences for Jack Brown (1001001)

☒ Yes, opt this constituent into site-wide email
 ☐ No, opt this constituent out of site-wide email

Preferred Format:

I would like to receive email about the following selected topics:

☒ Expand All
 ☐ Collapse All

Email Interests	Description	Status
<input type="checkbox"/> Education	top-level email interest for those interested in our education efforts	Subscribed
<input type="checkbox"/> Newsletter	for those interested in our newsletter	
<input checked="" type="checkbox"/> Workshops	for members who are interested in attending workshops	Unsubscribed
<input type="checkbox"/> Research	email interest for constituents who are interested in our research efforts	

or [Cancel](#)

Subscribed

No Preference

Unsubscribed

Can reset status to blank (No Preference)