## Welcome to Blackbaud's Luminate Quarterly Update

The audio for event will be broadcast through your computer.

## **ENGAGE WITH WIDGETS**







Slides



Help

## Pointers before we get started...

## This will be a listen-only call:

- Sound should broadcast through your speakers
- Trouble? Try refreshing your browser
- Chat in your questions via the Q&A box



#### **Q&A** details:

- Q&A summary to be provided within a week of call
- Please use product acronym as a prefix to your question:

Ex: **LOM** – Where can I find out more information on Sustainer Migrations Services Offer?

**LCRM** for Luminate CRM

**LOM** for Luminate Online Marketing

**ADV** for Luminate Advocacy

TR for TeamRaiser



# **Luminate Quarterly Update June 2015**

Luminate Online Marketing
Luminate TeamRaiser
Luminate Advocacy

## **Today's Presenters**



Julia Lenz
Sr. Product Marketing Manager,
Luminate Online



Brooke Huling

Director of Product Management,
Interactive Solutions



Andrew Wilcox

Product Management,
Luminate Online

## Agenda: Luminate Q2 Quarterly Update

## **Luminate Online**

Future: 2<sup>nd</sup> Half 2015 and beyond

Present: May-Sept Release New Features & Improvements

Feedback from You!: New Ideas Process and Survey

## Luminate Online Product Management Update

Brooke Huling, Director of Product Management, Interactive Solutions Andrew Wilcox, Product Management, Luminate Online



## What's Next?



Brooke Huling
Director of Product
Management,
Interactive Solutions



## 3 Year Horizon

**Short Term** 

Launch key product updates
Focus on quality and stability
Create the groundwork for Next Gen



**Mid Term** 

Complete product progression to Next Gen Build best in class solutions Implement more customer generated ideas



**Long Term** 

Innovation in social, digital marketing, analytics
Provide an award winning user experience
Deliver the most powerful reporting in market



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## **Luminate Online** Feature Roadmap

Short Term

Jan 2015

Mar 2015

Apr 2015

May 2015

July 2015 Aug 2015 Sep 2015

Nov 2015 1H 2016

#### 2014 Highlights

#### **RE + Luminate Online**

- · Bulk Processing
- · Gift Filters
- Automation
- Auto Updater

#### **TeamRaiser**

- Participant Center Email Workflow
- TeamRaiser Events Status Tab

#### **Compliance & Regulatory**

- DMARC
- · Canada's Anti Spam

#### **Payments**

· Credit Card Updater

#### 1H 2015

#### **RE + Luminate Online**

- · TeamRaiser Events
- Gift Filter Updates

#### **Advocacy**

- Advanced Targeting
- · Delivery Dashboard

#### **User Interface**

New Visual Theme

#### **Payments**

 PayFlow Pro Sustainer Migration

#### **Luminate Core**

 Phase 1:Org as a Constituent

#### 2H 2015

#### **RE + Luminate Online**

· Calendar Events

#### **TeamRaiser**

Responsive Ecomm

#### **Payments**

- · Sustaining Receipting
- ACH

#### **Luminate Core**

 Phase 2: Org as a Constituent

#### **General Improvements:**

- CMS
- Advocacy
- · Email and Reporting

#### 1H 2016

#### **TeamRaiser**

- Scheduled Coaching Emails
- · Delayed Self Pledge

#### **Payments**

· One-Click Payments

#### **Luminate Core**

 Phase 3: Org as a Constituent

\*\*Additional items within Infrastructure Roadmap

Legend:

Market Ready



In Progress



Proposed

Maintenance Release

## **Luminate Online** Infrastructure Roadmap

**Short Term** 

Jun 2015

July 2015

Aug 2015

Sep 2015

Oct 2015

Nov 2015

Dec 201

1H 2016

#### Q2 2015

- Improved caching and session management
- New defect SLA and release cadence

#### 2014 Highlights

- Defect fixes throughout 2014
- Database upgrades to improve quality and performance

#### Q3 2015

- New database servers
- New task servers
- New test labs:
  - Email capacity and deliverability
  - 2) Application processing and transaction speed
- Additional infrastructure, process and communication redundancies
- Secondary landing page, tailored for each client for emergency use

#### Q4 2015

 Improve rollback and deployment while strengthening vendor relationships

## Legend:

Market Ready

In Progress

Proposed

## NEXT GEN = LONG TERM

- New Infrastructure with industry leading SLA's
- 100% High Availability, no downtime updates
- Additional failover pages with dynamic content and donation/registration capability
- Full disaster recovery with tiered failover recovery based upon catastrophic event

Goal: Provide a highly accessible environment with additional disaster recovery, rollback and business continuity capabilities.

Implement additional infrastructure, process and communication redundancies.

Q3/4 - 2015

Provide a new secondary landing page, tailored for each client for emergency use.

Q3/4 - 2015

Improve rollback and deployment mechanisms while strengthening vendor relationships

Q4 – 2015+

Overall Benefits: Minimal or zero impact to clients mission with full access, limited maintenance windows, clear communication and an emergency landing page in the event of a catastrophic situation.

Goal: Focus on the scale and elasticity of Luminate Online

New database servers to provide 10X capacity

Q3 - 2015

New task servers to provide increased task processing power and speed

Q3 - 2015

Improved caching and session management to provide better performance

Q2/3 - 2015

Benefits: An overall expansion of the Luminate Online capacity while working with new technology standards to provide more power and stability to the overall platform and product.

Goal: Apply higher quality and operational excellence guidelines to the development and maintenance of Luminate Online.

Test lab for email capacity and deliverability

03 - 2015

Test lab for Luminate
Online application
processing and
transaction speed

Q2/3 - 2015

Developing new defect SLA and release cadence

Q2 - 2015

Benefits: A deeper and more structured focus on release quality and maintenance every 6 weeks while larger features are now released every 6 months with more testing, discovery, BETA and training.

## Plan for Success

## Mitigation (on-going)

- Server Upgrade for all Luminate Online and TeamRaiser Database servers
- Increased testing and approvals around each deployment to the platform while RCA's and 3<sup>rd</sup> parties investigate
- Daily executive meetings to review progress
- Product Advisory Group and Town Hall meetings to review plans
- Improve alignment of customer feedback with release planning (new Ideas portal)

### Stability (4-8 weeks)

- 3<sup>rd</sup> party audit of Luminate infrastructure
- Increase in-app monitoring and add additional NOC monitoring for more detailed alerting
- Added financial and human capital investments to the Luminate Online infrastructure and overall product
- Incident Management Team to help improve client communication clarity and consistency
- Additional test environments for full-scale capacity and production testing

### Trust (3-6 months)

- Rollback/change management improvement (on-going)
- New uptime service guarantees
- Alternative failover pages for static delivery of content and visitor capture

#### Success (next gen)

- New Infrastructure with industry leading SLA's
- 100% High Availability, no downtime updates or deployments
- Additional failover pages with dynamic content and donation/registration capability
- Full disaster recovery with tiered failover recovery based upon catastrophic event type (hardware, software, mother nature)







**Interactive Ecosystem** Mid **Term DATA** THOUGHT LEADERSHIP INTELLECTUAL CAPITAL **SERVICES & SUPPORT TECHNOLOGY** 

VOY

POWERFUL - SIMPLIFIED - SCALABLE

## Interactive Foundation

Mid Term









Multi-channel digital marketing and sponsorship with one campaign workflow. Create API, Flex-UI and Datamart to handle other channels for a seamless experience.

Leverage
intelligence, social
and other dynamic
data to suggest or
update campaigns
based on real-time
results, therefore
driving more dollars.

Create a system of intelligence where campaigns get smarter, calendars automate and mission minutes increase as the system learns to optimize

Blend rich system data, Outcome
Measures and Market
Analytics to create the most powerful decision making engine on the market.

## **Interactive Road Ahead**

**Long Term** 

Digital Marketing

Content

Campaigns

**Templates** 

Sponsorships

Advocacy

Call to Action

Segmentation

Automation

Iterative



Events

DIY

eer

Crowdfunding

Social



xperience

Profile

**Payments** 

Receipts

**Participate** 

Gamification



Mobile

Admin Responsive + App

SMS/Text

**Push Notify** 



Google play

Donor Responsive + App

## **Scalability**

Long Term

Scale Out

Expandability

Simplicity

## Elastic

Scales up and down with seasonality and growth patterns

## Capacity

- Data retention control, compression and usage
- Content Management expansion 10X

## Burst

- Email burst up to 30(M)/hour 2015
- Up to 2K transactions per minute

## Real-Time

- Dashboards, campaign data and summary KPI's
- Social monitoring and engagement

## Data

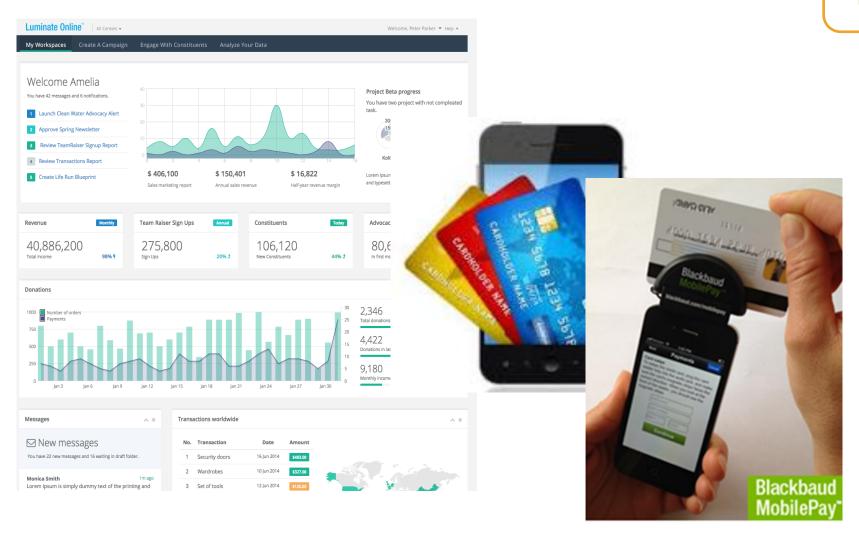
- Non-production, refreshed daily for full scale reporting
- Data- cleanup, repair, sync and detailed analytics

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## **Analytics & Payments**

Long Term

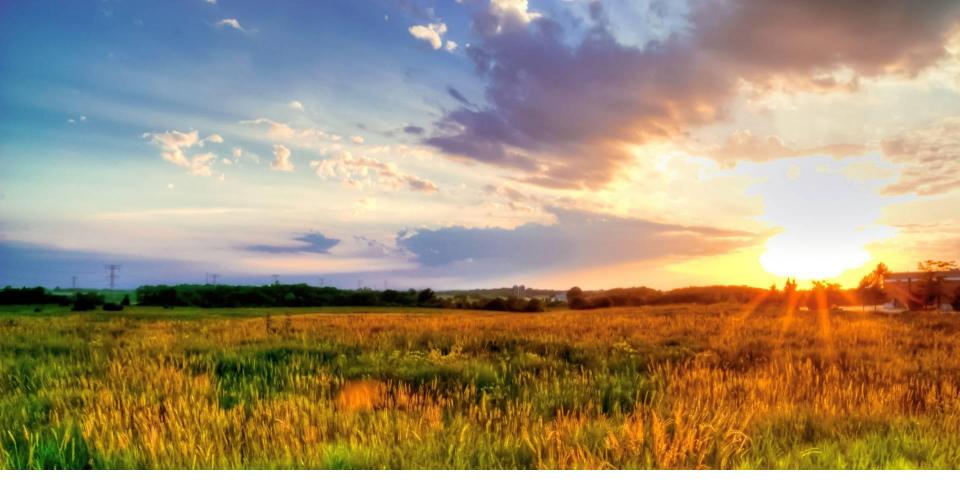


## **Luminate Online™ NEXT GEN Roadmap**

Long Term

Aug 2016 2016 2H 2016 2017 2015 Highlights 1H 2016 **RE + Luminate Online New Reporting Dashboard Basic Campaigns (cont.) TeamRaiser**  TeamRaiser Events Donation Forms Social · Calendar Events **Advanced Content** Advocacy **Basic Constituents** Advocacy Individual and Org **Advanced Constituents** · Advanced Targeting **Targeting** · Delivery Dashboard Segmentation **Advanced Campaigns Luminate Core** History Online Email Org as a Constituent **Basic Campaigns** Social **TeamRaiser** Calendar Legend: Event Workflow · Responsive Ecomm Advanced Advocacy Market Ready User Interface R/W/R **Payments Basic Content** DIY PayFlow Pro Sustainer In Progress Letters to the Editor Migration CMS · Annualized Receipting · Page+FormBuilder Proposed ACH Maintenance Release

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## "The Best Way to Predict the Future is to Create It."

- Peter F. Drucker

## What's New?



Andrew Wilcox

Product Management,
Luminate Online

## Highlights May - Sept Releases

## **LUMINATE CORE**

Organization as a Constituent Email status notification User Interface updates

## **ADVOCACY**

Deliverability updates
Communicating with Congress

## RAISER'S EDGE and LUMINATE INTEGRATION

**Luminate Calendar Events** 

## **PAYMENTS**

Sustaining Receipting

## **LUMINATE CMS**

Stats and Improvements



## **LUMINATE CORE**



# Organization as Constituent & Record Hierarchy - Phase 2 of 3:

Coming September

Org as a Constituent will go live in Luminate with August Release!

#### Phase 3 - Feb 2016 Phase 1 - Feb 2015 Phase 2 - Sept 2015 LO Organizations •LO Org. Multiple Contacts Reporting •LO Org. Hierarchy •LO Org. Hierarchy (3 levels) Clean-up •LO Org. Contact (1 ea.) •LO Org. Contact Roles •LCRM / RE Integration (Date TBD) Org. "Association" to TR Events Org. Offline Gifts to TR participants & Org. Offline Gifts to TR Events teams Live in Phase Organizations **BILL** Transactions **TeamRaisers** Profile Contacts Notes Organization Hierarchy

Profile Co

Contacts

Transactions

First

Previous

Notes

Next

Delete

Edit

Delete

Last

TeamRaisers

Organization Hierarchy

Coming September

Walgreens > Contact Listing



## Multiple Contacts

## Walgreens

Records 1 - 3 of 3

Event Contact

Jim Jenny

Event Contact

Primary Contact

fl Search Show All				Page 1 of 2+
Name	<b>\$</b>	Action	Contact Information	Notes
Josh Garrells		Edit	jgarrells@gmail.com	

843-234-4454

843-234-4454

igarrells@gmail.com

## **Organizations**

Profile (

Contacts

Transactions

Notes

TeamRaisers

Organization Hierarchy

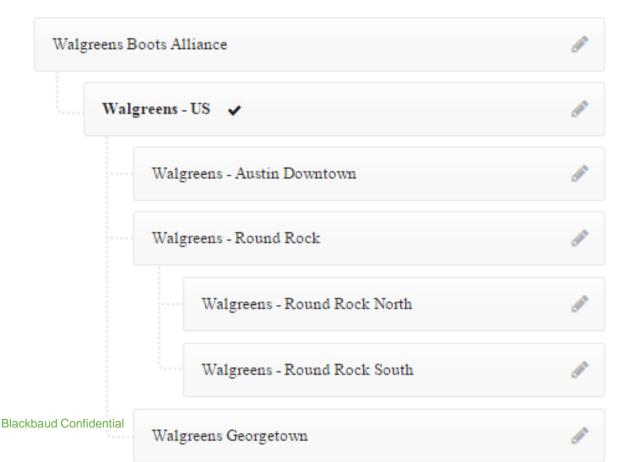


Organization List > Walgreens

## Multiple Levels of Hierarchy

## Walgreens

View or add a parent or child organization using the options below.

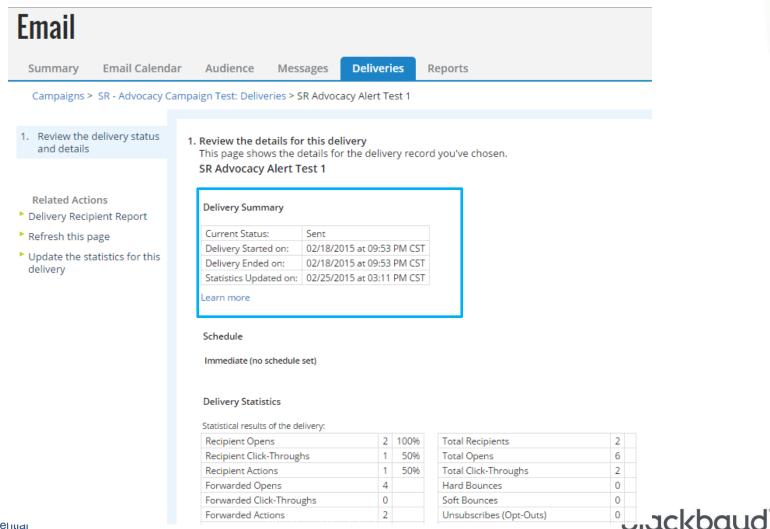


**sckbaud** 

## **Email Status Notification**

Available Now!

New Improved Email Status in Delivery Review Page



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## **Email Status Notification**

## Available Now!

## Example Setup Screen

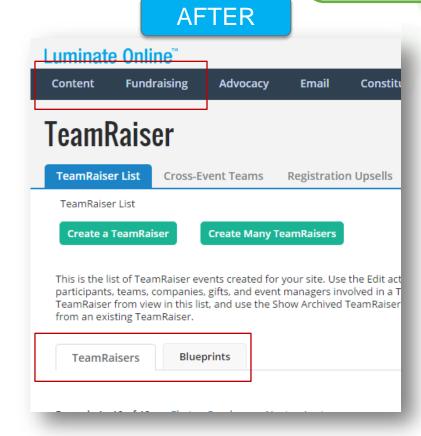
Campaigns > Welcome Series: Messages > Welcome Series #2

. Message Information	iii * 1. Sender Name:
. Envelope	Enter the name to display in the From area of the email header and inbox of message recipients.
. Stationery	American Health Society - helping you live healthy lives
. HTML Content	
. Plain Text Content	** 2. Sender Email Address:
. Send Review Email	Enter the email address to associate with the Sender Name in the From area of the email header and inbox of message recipients.  To avoid deliverability issues, do not enter a @yahoo.com or @aol.com email address. For more details, refer to the Yahoo DMARC policy.
. Approve	devnull@convio.com
. Create a new Variant	
	3. Reply-To Email Address: Enter the email address where replies to the message will be sent. The Sender Email Address will be used by default if empty.  *** 4. Message Subject: Enter the phrase or select a personalized option to display in the Subject area in the email header and inbox of the message recipients.  Get involved with American Health Society  Select Personalization Option **  Select Personalization Option **
	5. Email Status Notifications Enter an email address to receive status updates for this email message. You can provide multiple email addresses, separated by a comma, up to 255 a maximum characters. (for example, Sam.Smith@site.com, Jane.Jackson@site.com)
	Next Save or Cancel

## **User Interface Updates**



#### **BEFORE** Luminate Online Content **Fundraising Advocacy Email** Constit **TeamRaiser TeamRaiser List Cross-Event Teams Registration Upsells** TeamRaiser List Create a TeamRaiser This is the list of TeamRaiser events created for your site. Use the Edit act participants, teams, companies, gifts, and event managers involved in a T TeamRaiser from view in this list, and use the Show Archived TeamRaiser from an existing TeamRaiser. TeamRaisers Blueprints



Based on your feedback - Changes for better contrast and readability:

- Primary navigation font
- Tertiary tab font
- Input/txt box styling

# PCI Compliance: Session ID Removal

Removal through June

To adhere to new July 1<sup>st</sup> PCI compliance standards, Session ID data in Luminate URLs is being removed through June.

## Old URL



**User Session Information** 

 $\dots$ /Donation2;jsessionid=9D37D077649DB8FE3AED56F32D935D5B.app203a?1234. donation=form1&df\_id=123

#### **New URL**

.../Donation2;jsessionid=00000000.app203a?1234.donation=form1&df\_id=123



## Who does this impact?

- Clients who previously relied on session ID in the URL for functionality on any website or app
- Typically anyone who used the GitHub LuminateExtend javascript library(version 1.6 or earlier)
- Refer to KnowledgeBase Article for additional questions: http://bbmarketplace.force.com/bbknowledge/articles/Article/73342

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## **ADVOCACY**



**Deliverability Updates** 

Available Now!

## Improving target delivery rates continues to be our #1 priority

Below improvements have resulted in a total increase in deliverability across all advocacy targets:

- Advocacy Data improvements (Updates every 2 weeks)
- Resolved webform collision defect
- Backend infrastructure assessments
- CWC Integration improvements
- Reporting enhancements

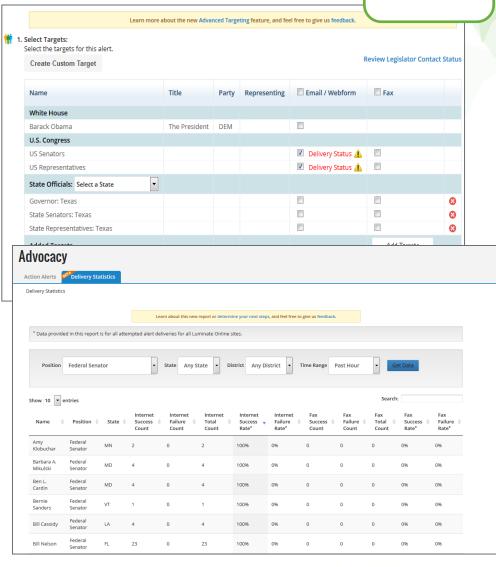
## **Additional Resources:**

**Community Post** 

**Search: Advanced Targeting** 

**Knowledge base** 

**Article: 73696** 





## **Communicating with Congress (CWC)**

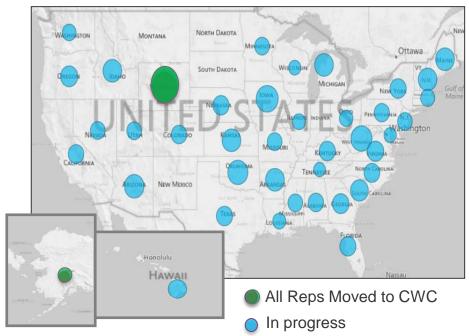
At the Federal level, CWC continues to be the best solution for ensuring successful webform delivery

142 US representatives currently use CWC forms:

- Luminate Online Advocacy supports all 142 targets
- Delivery rates are consistently at or above 98% across all client sites
- House of Representative staffers maintain that the goal is to have all reps moved to CWC by end of year

## **US House of Representatives, CWC Progress**

As of: 5/26/2015



## **Upcoming Advocacy Webinar**

#SocialCongress: Perceptions and Use of Social Media on Capitol Hill

Tuesday, 6/16, 2-3 ET - Register at hello.blackbaud.com/advocacy

# RAISER'S EDGE and LUMINATE INTEGRATION



# Luminate Calendar Events + RE:Events

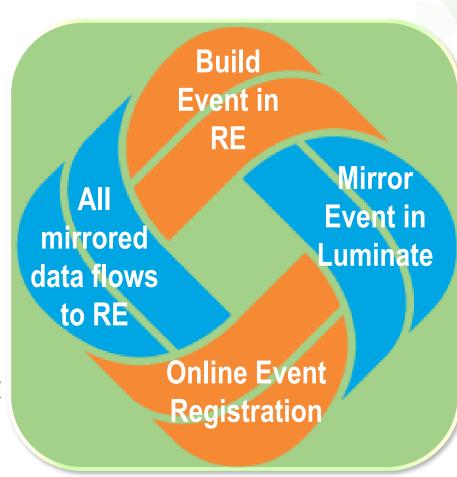
Coming August

TeamRaiser events were integrated into RE back in January and now Luminate Calendar Events are up Next!

This feature integration bridges a gap between online event registration and managing events on RE

We'll also bring in **survey data** from Luminate to RE with this release

Calendar event integration back into RE allows improved segmentation and personalization plus improved event task management



## **PAYMENTS**

**Sustaining Receipting** 

- Aggregated receipting for sustainer gifts only



## **New Sustaining Receipt Template**

Coming September

#### **Receipt Manager**

Receipts

**Global Options** 

Receipts > Create a New Template

In September, we'll be adding the ability to produce an aggregated receipt for sustained gifts within Luminate Online.

- 1. Identify Template
- Upload File
- Select Applications
- 4. Configure Autoresponders
- 5. Publish Template

	Name: Identifies this template to a	administrators for	internal use		
	eceipt Type dentifies the type of receipt	template created			
	Individual ▼				
2.	Individual Sustaining				
	Controls who can create and edit the receipt				
	General ▼				
	D 6				



Prefix:

Adds a prefix (alphanumeric with a maximum of 10 characters) to the receipt number

## **Receipt Groups**

Coming September

### Receipt Manager

Receipts

**Global Options** 

You will also be able to generate receipts for groups to be delivered at the same time

Receipts >

- 1. Select Audience
- 2. Delivery

- 1. Select Audience
  - Everyone with a sustaining gift
  - A specific constituent with a sustaining gift
  - A target group
- 2. Select Date Range of Sustaining Gifts to Receipt

to	

Next

or Cancel

## **LUMINATE CMS**



## **CMS Stats and Improvements**

In the last quarter we deployed 2 major Luminate CMS releases, both of which were focused on improving performance and quality across the product.

- 11-CMS-8:
  - Database migration and infrastructure improvements
- 11-CMS-9:
  - Branding has been updated to continue to replace "Convio" with "Blackbaud" logos and references
  - Improvements have been made to ensure PCI compliance
  - A <u>new feature</u> has been released for previous and next functions
  - 4 defects resolved (see <u>release notes</u> for details)

After these changes, CMS available capacity went from an average of 33% to 90%



## Looking for more?

New lightbox appears prior to a release Contains a link to release notes with more details! strator Home rage System Messages Customer Center Version 15.5 of Luminate Online is coming! Over the next two weeks, your site will be hosting the Client Customer Center, SSO to Learn updated to include: ents out of Marketo · Easy access to our Ideas portal nected sites Scrolling improvements for merchant accounts and gateways · Improved navigation in Advocacy's Target lists See New Features and Release Notes to learn about more improvements! ort Portal new client records by adding a contact in Salesfor Dismiss Messages ords directly in this instance. Processing is LIVE and Active se caution with transaction related activities. make changes to PageWrapper without consulting

ied in the Last 10 Days

d: May 20, 2015 4:36:10 PM

A new release calendar will be released on 6/30 and available on the community

e Name	Category	Description	Last Modified
t_info	Support	inserted as an iframe into the full customer portal (BB branding, plus tabs for Ideas and Bugs)	2015/05/20 by Cynthia Nolen
i de la companya de	Registered users	new blackbaud homepage	2015/05/18 by System Administrator

minate Customer Centi

# Let's hear from you!

### **AHA! Ideas Portal**

Lets take a look at the lifecycle of an idea submitted through our new portal!

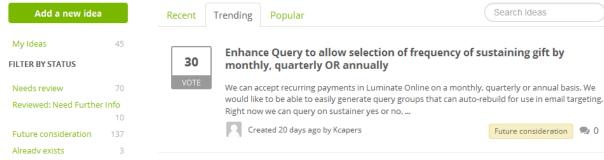


#### blackbaud<sup>\*</sup>

#### **Welcome to Luminate Ideas!**

Please submit all product enhancement ideas below. We welcome your feedback; your ideas will be reviewed by the Product Manager that oversees the development of that part of the product and updated with its current status so you know where it is in our review process. Ideas you submit could help us shape features currently in development or grow our repository of requirements for our next big enhancement. Thank you for taking the time to share your thoughts and expertise with us.

If you believe you are experiencing a defect or have general information that you wish to publish, please submit those within the Luminate Community or contact Support.





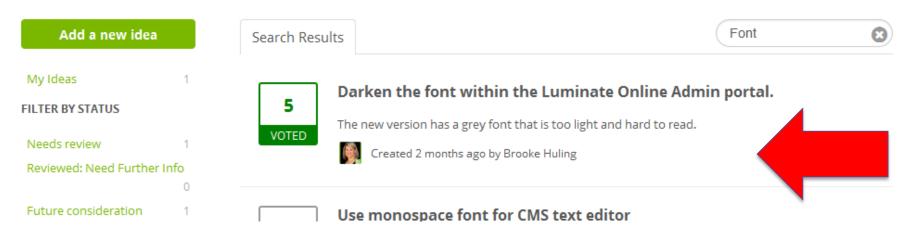
### **Idea Generation**

### blackbaud<sup>®</sup>

#### **Welcome to Luminate Ideas!**

product enhancement ideas below. We welcome your feedback; your ideas will be reviewed by the Product Manager development of that part of the product and updated with its current status so you know where it is in our review u submit could help us shape features currently in development or grow our repository of requirements for our next big enhancement and you for taking the time to share your thoughts and expertise with us.

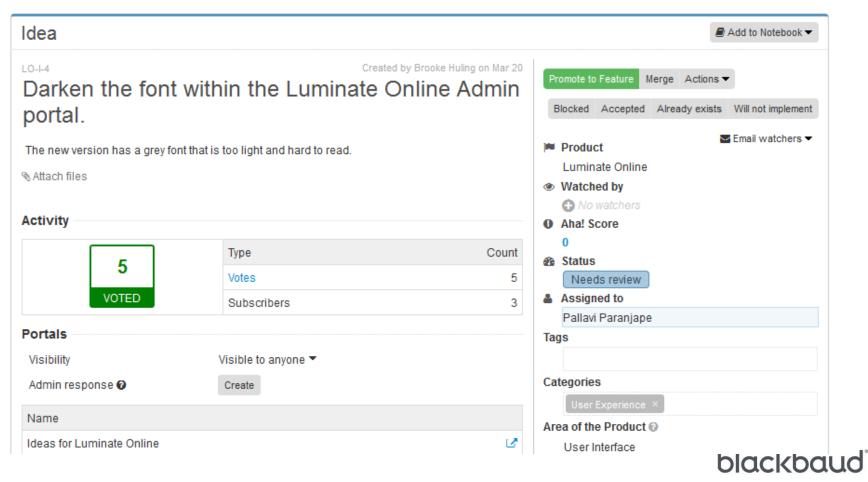
If you bell, are experiencing a defect or have general information that you wish to publish, please submit those within the Luminate Co. munity or contact Support.



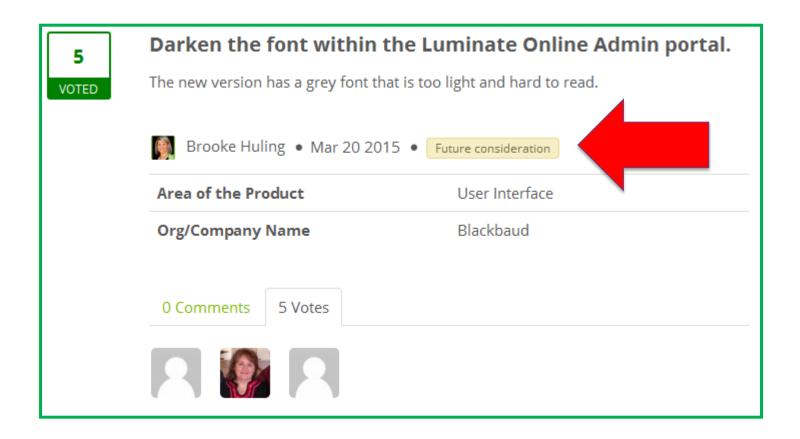


### Idea Review



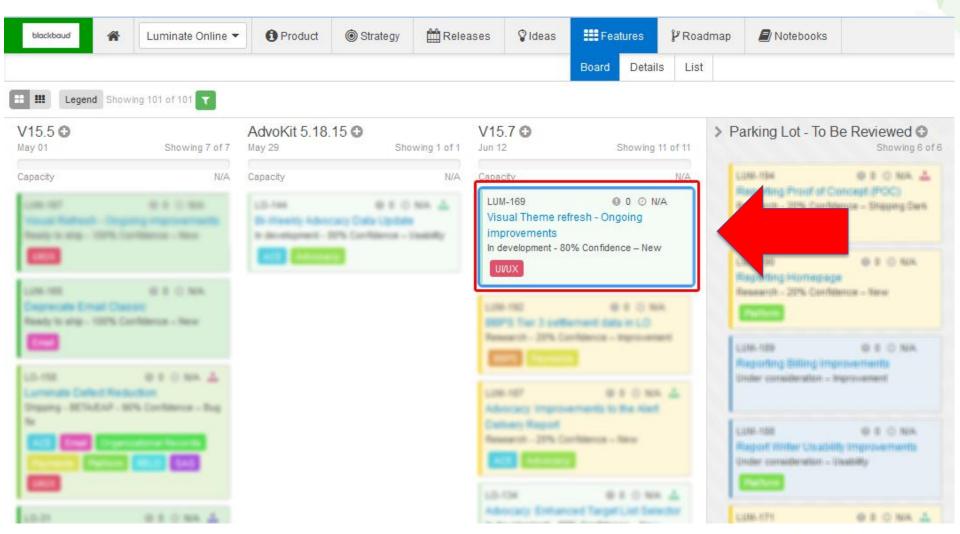


## **Gathering Feedback**



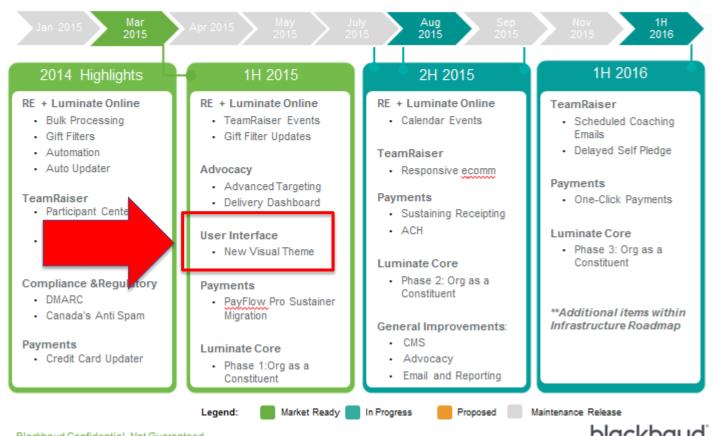


## Add to Roadmap



### Communication

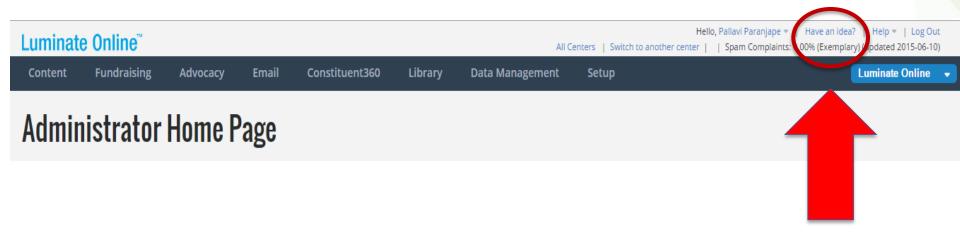
### **Luminate Online** Feature Roadmap



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### So how do I submit an Idea?



Embedded in the Product, click the link next to your name!

## In Product Survey

#### System Messages

#### Got a minute? We're listening!

Please take a moment to give us feedback about your Luminate Online experience - good, bad, or indifferent. Your feedback will help us improve the usability of the site, so that we can better support you and your organization's mission.

The survey is only 12 questions and takes approximately 5 minutes.

#### Take the Survey Now!

(https://www.surveymonkey.com/s/VYHN2JG)

Thank You.

The Luminate User Experience Team

This message will disappear when you click "dismiss". If you want to take the survey later, please open the link in a new tab and bookmark it for later.

Dismiss Messages

A one time window popup in the tool inviting you to survey A reminder email will be sent the 1<sup>st</sup> week of July Provide contact info to be included in further research!



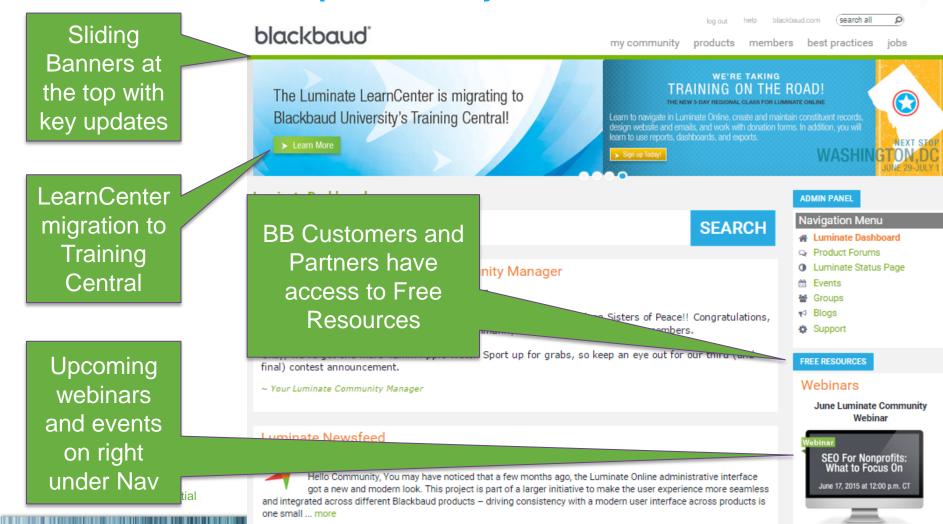
## **WELCOME TO THE NEW** LUMINATE COMMUNITY

### https://community.blackbaud.com

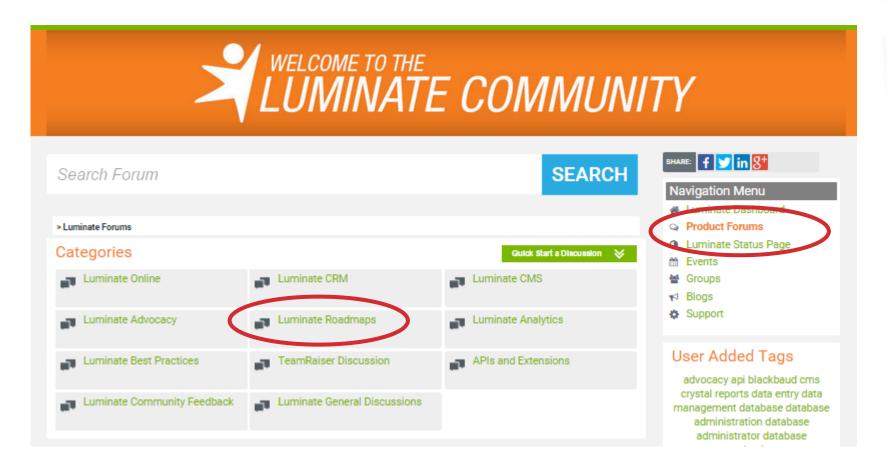
Sliding Banners at the top with key updates

LearnCenter migration to **Training** Central

**Upcoming** webinars and events on right under Nav



### Where can I find this presentation?



The recording for this presentation will be the same link you selected and available in about 24 hours.

# Thank you!