

# INTEGRATED SUITES PRODUCT REVIEW

An overview of six of the top integrated applications aimed at mid- to enterprise-size nonprofits.

## Products Reviewed:

Affinaquest™/2Dialog  
by Affinaquest and 2Dialog

Avecetra Social CRM –  
netForum Enterprise™  
by Avecetra

Luminate™ suite  
by Blackbaud (formerly  
a product of Convio)

Raiser's Edge™/BBNC™  
by Blackbaud

roundCause™  
by roundCorner

Springboard™  
by Jackson River



# TABLE OF CONTENTS

<b>Introduction.....</b>	<b>3</b>
<b>The Integrated Suites</b>	
<b>Affinaquest™/2Dialog™ by Affinaquest and 2Dialog .....</b>	<b>6</b>
<b>Avecra Social CRM – netFORUM Enterprise .....</b>	<b>10</b>
<b>Luminate™ Suite by Blackbaud.....</b>	<b>14</b>
<b>The Raiser’s Edge®/NetCommunity® by Blackbaud.....</b>	<b>18</b>
<b>roundCause™ by roundCorner .....</b>	<b>22</b>
<b>Springboard™ by Jackson River .....</b>	<b>26</b>
<b>Conclusion .....</b>	<b>30</b>

# INTRODUCTION



Since the popularization of online marketing applications, it's been quite common for nonprofits to have separate databases to manage their "offline" traditional fundraising and donor management on the one hand, and an online database to manage online marketing efforts on the other hand. For most folks, over the years it's been a constant challenge to exchange constituent and financial data and keep both systems updated. There are also always questions of, "What belongs in each system?" In fact, a survey by NTEN in December 2011 showed that even when respondents were happy with their donor management and online marketing applications, they were consistently unhappy with the integration between the two, and the tools available to do so.<sup>1</sup>

But, the product landscape is changing. There are now numerous solutions on several platforms that seamlessly combine traditional donor management functionality with online marketing capabilities. Most of these products can be expanded to support business functionality beyond fundraising and marketing communications, into a total Constituent Relationship Management (CRM) system. (For more information about how nonprofits are approaching CRM, see our paper, Insights into CRM for Nonprofits: <http://www.theconnectedcause.com/crminsights>).

This report offers an overview of the top applications available in this market. We review unique aspects of each product, address what we like best about each, and note some important things to consider before adopting each product. Our goal is to help you plan your organization's move into today's world of integrated suite applications. We hope this report will encourage you to further investigate software applications and contact Heller Consulting if we can assist you with the selection, planning or implementation process.

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CRM FULLY ENGAGES BOTH INTERNAL STAFF AND EXTERNAL CONSTITUENTS IN EXPANDING THE IMPACT OF THE ORGANIZATION'S MISSION. MULTIPLE PIECES OF SOFTWARE WORK IN COORDINATION WITH BUSINESS PRACTICES TO MANAGE INFORMATION AND MEET KEY BUSINESS NEEDS. CRM CAN ALSO INCLUDE INTEGRATIONS, BUSINESS INTELLIGENCE TOOLS AND DATA WAREHOUSE SOLUTIONS.

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<sup>1</sup> Hoehling, Annaliese. "2011 Nonprofit Data Ecosystem Survey." Nonprofit Technology Network, December 2011, p.37



## WHAT DOES "INTEGRATED SUITE" MEAN?

An Integrated Suite is a combination of a traditional fundraising and donor management system (used for constituent management, gift processing, major gift and grant cultivation, etc.) plus an online marketing system (used for email campaigns, donation forms, peer-to-peer and team fundraising, possibly social engagement, etc.). As classic fundraising strategies like direct marketing and events have become operationally integrated between traditional "offline" activities and online activities, there is an ever-growing need for the two systems to work together.

Sometimes the two systems come from the same vendor, and sometimes the best combination for your organization will come from two different vendors. The important thing is that the Integrated Suite removes the hassle of manually exchanging data and deciding what to put in each system, and makes each system more powerful.

## HOW DO THESE INTEGRATED SUITES RELATE TO CRM?

At Heller Consulting, we believe that true Constituent Relationship Management is crucial to every organization's mission success and continued growth. Implementing an Integrated Suite could be the first step in moving toward your organization's complete CRM vision. Maybe you already have an all-inclusive strategy and your software applications are not working well together to keep pace with your needs. Maybe you're developing a holistic strategy for the first time and you need to get started with tools that work together. For many organizations, the donor management system and online marketing database make up the core of their current CRM system, and, not coincidentally, are two of the largest systems in use. Getting these two core systems to work together, share strategies, and align operationally is crucial to the development of your organization's ultimate CRM state.



## THE INTEGRATED SUITES

*This report focuses on six of the top applications aimed at mid- to enterprise-size nonprofits. The applications we review (in alphabetical order) are:*

- Affinaquest™/2Dialog by Affinaquest and 2Dialog
- Avectra Social CRM -- netForum Enterprise™ by Avectra
- Luminate™ suite by Blackbaud (formerly a product of Convio)
- Raiser's Edge™/BBNC™ by Blackbaud
- roundCause™ by roundCorner
- Springboard™ by Jackson River

## VENDOR INVOLVEMENT

Each vendor mentioned in this report participated in its development by making staff members available to discuss functionality and usage with our consulting team. In some cases, vendors provided "sandbox" product environments for us to test. We have invited each vendor to include a brief statement about their product roadmap. While vendors reviewed our summaries for factual errors, they did not have editorial control over the content of the report, nor did we receive any financial or other support from any vendor.

### **Important Disclaimer**

The information contained in this report is as true and accurate as we could possibly make it at the time of its writing. All information in this report is based on public information from each software vendor's website, our own observations from using and/or testing each product, or from direct communications with each vendor's staff members. Software applications are continually changing, so keep in mind that this report is accurate as of April 2013; you should always confirm information from each vendor before making a purchasing decision.

# Affinaquest™ / 2Dialog™ by Affinaquest and 2Dialog



[www.affinaquest.com](http://www.affinaquest.com)  
[www.2dialog.com](http://www.2dialog.com)

## AT A GLANCE

Vendor	Affinaquest and 2Dialog
Platform	Salesforce and proprietary
On-premise or Cloud-based?	Cloud-based
Cost	Minimum \$1,000/month for suite

## DESCRIPTION AND PLATFORM

Affinaquest is a fundraising and donor management application built on Salesforce's Force.com platform. It specializes in prospect, constituent and fundraising campaign management. 2Dialog is an online suite of products that focuses on communications and engagement. Optionally, it also includes modules for peer-to-peer fundraising and event and ticketing management. The 2Dialog products are not built on the Force.com platform, but are hosted online and accessed by customers via a web browser. The two products are combined via an integration that writes and syncs data back and forth between systems, augmenting each system with the strengths of the other.

Each product can be purchased separately as a standalone system, or both can be purchased and the integration engine will keep them in sync. The combined suite includes the Affinaquest Nonprofit Fundraising version and four pieces of the 2Dialog collection: the Billboard™ email marketing system, Re-Union™ CRM database, Insight™ analytics engine and DeXE™ data exchange tool. The 2Dialog peer-to-peer fundraising and event and ticketing products, PeerPoint™ and BoxOffice™, are purchased separately. Though the suite includes two CRM databases, the integration is smooth enough that the usage of each system is clear and Salesforce.com data storage is managed appropriately.

## INTEGRATION

The integration between Affinaquest and 2Dialog is extensive and uses 2Dialog's own DeXE data exchange product. Some information, such as new Contacts and transactions that come in from online efforts, is synced back to Affinaquest immediately. Other pieces of data are refreshed on a nightly basis. Much of the data around communication responses and transactions is brought back to the constituent record in Affinaquest from 2Dialog, but a full view of all activity 2Dialog has recorded for the constituent is always visible through 2Dialog's Re-Union™ product, which stores



a profile for each constituent in the database. Re-Union can be accessed from within Salesforce.com using single sign-on and a web tab, providing a unified experience for the user.

2Dialog's Billboard module makes it easy to embed action/donation pages within a Facebook page, blog or website. Reference codes allow users to share links to a custom donation/action page or microsite through Facebook or Twitter™, and track signups and donations acquired through those channels for targeted fundraising and conversion.

While 2Dialog's suite of products are not a suitable replacement for a full-featured CMS, the communication tools included in Billboard allow it to capture data, accept form submissions, and process transactions in a seamlessly integrated way with an organization's existing website.

Affinaquest can be integrated with WealthEngine's wealth intelligence solutions (at additional cost) and an integration with PG Calc™ planned giving software is on the roadmap.

## USABILITY

A nonprofit would most likely use Affinaquest to manage prospecting and cultivation activities, and 2Dialog for engagement and mass communications. Donors would receive communications from the 2Dialog platform, and development teams would use Affinaquest to manage donors and prospects. Both products are designed in a way that makes them easy to learn.

## COST

Affinaquest's Nonprofit Fundraising pricing is based on the number of Contact records the organization has in its database, and includes an unlimited number of seats. Pricing starts at \$300/month. The per-month fee increases as the number of Contacts in the system rises. The Affinaquest subscription fee includes unlimited access to email, live chat and community forum support, as well as unlimited attendance to live training sessions and training videos.

2Dialog pricing is based on usage. The monthly subscription fee starts at \$700/month. The average customer spends approximately \$1,000/month, which includes emails sends, transaction processing fees, reporting and support



## FUNCTIONALITY

Highlights of the suite's functionality include:

- Billboard's action page and email marketing tools are particularly feature-rich. The email marketing tools include the ability to do drip campaigns and A/B testing, create multiple email templates, send emails in a specified order, and preview how messages will be seen in many different browsers before sending. The form tools include the ability to create donation pages with dynamic gift arrays, automatically attach reference codes, and add constituents to groups and memberships. It also includes many features for creating landing pages, forms, surveys, and microsites for maximizing engagement and acquisition of constituents and donors.
- Billboard has strong segmentation functionality with its Groups and Memberships features in the Re-Union CRM database. A Group is like a query group or a Salesforce Campaign Membership. A Membership in Re-Union takes the Group one step further and gives every constituent in the Group a status.
- Billboard can be configured to send automated receipts/acknowledgments for online donations, and it handles this functionality very well. Affinaquest customers typically employ an additional tool such as Conga Composer™ (at additional cost) to produce mail-merged acknowledgement letters.
- Form creation is very flexible and robust in Billboard. Reference codes are used within Billboard to track constituent's responses, lead sources, actions, etc. Reference codes can be easily attached to any form, email, page, etc., allowing the organization to capture constituents' interests and activities.
- Peer-to-peer fundraising is handled through 2Dialog's PeerPoint™ product. PeerPoint allows individuals to create their own donation pages or create teams. Pages can include photos, YouTube videos and documents, and donors can share their pages across multiple social networks including Twitter, Facebook, LinkedIn™ and others.
- Traditional gift processing happens in Affinaquest, which is well-equipped to manage many types of gifts, including the gift types that nonprofits deal with every day: pledges, recurring gifts, planned gifts, matching gifts, and major gifts. Batch functionality is strong and is the only way of entering gifts, enforcing best practices.
- Affinaquest has built a custom object called Fundraising Campaigns as a centerpiece of the application. Many fields and visuals have been added to enable quick and easy performance and pipeline reporting. Fundraising Campaigns can be thought of as the highest level of tracking fundraising activity, and traditional Salesforce.com Campaigns are then associated with Fundraising Campaigns.



- Affinaquest has recently introduced Opportunity Teams, Stewardship Plans and Action Plans to the Opportunities object, which Affinaquest uses for proposal management. These features allow fundraisers to track, in greater detail, the people involved and the specific plans and activities to cultivate all types of gifts.

## HOW AFFINAQUEST / 2DIALOG SERVE NONPROFITS' NEEDS

Affinaquest and 2Dialog are both thoughtfully-designed, feature-rich products with a great deal of industry experience behind them: Affinaquest's founder previously created the Millennium™ donor management product, while 2Dialog's roots, going back to the 1970s, are in sophisticated direct mail automation. Organizations with complex CRM requirements could find all of them met by the many functionalities included in the Affinaquest and 2Dialog integrated suite. With constituent and fundraising campaign management, email marketing, form building, and peer-to-peer and event management tools, the Affinaquest and 2Dialog integrated suite is a modern, flexible system designed to meet many nonprofit organizations' needs.



### AFFINAQUEST / 2DIALOG ROADMAP STATEMENT

2Dialog and Affinaquest continue to enhance the product features/suite on a continuous basis. Highlights expected to be released are enhancements to existing Event Management module, Volunteer Management and Content Engine to name a few. And as always we encourage our customers to provide enhancement ideas that can be added to the roadmap for immediate review.



## AT A GLANCE

Vendor	Avecetra
Platform	.NET/SQL-based
On-premise or Cloud-based?	Cloud
Cost	\$175-\$225/user/month, plus implementation costs

## DESCRIPTION AND PLATFORM

Avecetra's flagship product, netFORUM Enterprise, is a sophisticated CRM platform that utilizes Microsoft web technologies. It allows for seamless integration with the built-in CMS tool. Data can be made visible from the CRM and content can be targeted based on the back end data. The product is web-based and, with few exceptions, is hosted by Avecetra. To access the tool, person needs a web browser. The solution can be customized. Organizations will need Microsoft SQL Server 2012 and MS Visual Studio 2012.

## INTEGRATION

The website and the CRM system are constantly in sync. As people enter information on the website, it is immediately available in the CRM system. This is true for constituent information, registrations, and all financial transactions. This means a lot fewer integration set up headaches. Some setup is still required, in that clients will need to develop the forms that will be presented to external users (via the website) and test them accordingly. There are no limits to what can be presented externally — any objects or custom fields can be made visible on the website.

Email campaigns are built in the eMarketing module. The module allows users to be very specific about exactly which criteria they'd like to use for their email campaigns. Detailed open rates, click through, etc. are not tracked using their internal email tool. However, Avecetra has built various integrations with multiple email service providers to allow users to take advantage of those options. A separate agreement is required to leverage the third-party services.

Avecetra's CRM system includes a social console that allows social media management and monitoring. The console includes tools for monitoring, engaging, publishing and scheduling social media. Users can capture and record specific conversations from Twitter, Facebook, LinkedIn and Google Plus™ in the CRM system, allowing social media initiatives to be measured and tracked.



Avecetra offers many standard integrations with commonly used office tools, such as running a letter to a Microsoft Word merge directly from a record, and exporting data to Excel.

There are integrations with WealthEngine, CongressPlus™, Capwiz™, Passkey™, various address verification services, Facebook, Twitter, Google Maps™, various payment processors and UPS. There also are standard output files for the following accounting packages: PeachTree™, Great Plains™, MS Dynamics™, Quickbooks™, Solomon™, Platinum™, MIP™, MAS90™, Flexi™, and ACCPAC™.

## USABILITY

As with any new software, there is a bit of a learning curve for new users. However, the system can be significantly customized to ensure important fields are front and center for users.

Setting up donations forms is relatively easy, in that the form editor is intuitive and the fields are automatically mapped to their corresponding fields in the database. The CMS allows easy drop in of "parts" for registrations and other options to easily display donor information.

For managing the system, a technical person is required. Making customizations requires someone with SQL knowledge for the database and web technology knowledge (HTML, CSS, etc.) for the web portion. A non-technical person can use the netFORUM Enterprise toolkit to make a lot of changes to fields, menus, business logic, page layouts, and objects, but some customizations may require a developer. The toolkit allows clients to make customizations without leaving the upgrade path. Avecetra supports a wide market of independent developers who work with clients to customize their systems.

## COST

The system costs approximately \$175-\$225/month/user. The exact license price per user depends on the number of licensed users. Implementation costs vary, but can be expected to be approximately \$300,000.



## FUNCTIONALITY

Highlights of the suite's features include:

- Avecra's constituent management is very robust, allowing sophisticated handling of contacts at organizations and multiple mailing addresses. It is very easy to add custom fields that can be used to further segment constituents.
- Donation acknowledgement can be done through email or through mail. They can be easily generated directly from a donation. They also can be run through a bulk process.
- There is the ability to add campaigns, funds, appeals, and packages to any gift. Segmentation capabilities allow for the creation of "audiences," which allows merging of many queries to produce a single list. This feature works for Individuals only.
- Overall, financial processing is mixed. Each transaction requires a "product" and a pricing code, which can become complex to set up for all the types of transactions an organization may expect to receive.
- Batch entry offers basic functionality for entering gifts en masse. Some more advanced options are not yet available.
- Tributes are handled well, allowing multiple gifts to be linked to a single tribute. Organizations can set up multiple recipients of notifications, and make the tribute visible in a web page. All gifts made through that web page automatically link back to the tribute record.
- Events management is robust for complex conference-type events with multiple tracks, sessions, speakers, discounts codes, etc. Its functionality for gala and golf type events could be further developed.
- There is a sophisticated committee management module as well as the ability to track volunteers at events, but there is not a standalone volunteer module. This would need to be developed by adding custom objects, fields, and workflows.
- Avecra offers a separate crowd-contributing solution — IdeaStarter™. The solution, which can be used similarly to a peer-to-peer or team fundraising application, allows organizations to complement existing campaigns with micro-projects to secure funding, resources, volunteers and connections. IdeaStarter can be integrated with any CRM or donor database, or can be used as a stand-alone solution. IdeaStarter has no initial set-up fee and does not require programmers or graphic designers to get started.



## HOW AVECTRA SERVES NONPROFITS' NEEDS

Overall, Avector's netFORUM Enterprise is highly sophisticated. It will serve large nonprofits very well and provides a high level of functionality and customization for clients. Because of the functionality and options available, it requires dedicated resources to manage, customize, and maintain it long-term.

We have been particularly impressed by a defining feature called the A-Score™. The A-Score allows organizations to measure the engagement level of individuals and organizations on an ongoing basis. Each A-Score can be customized to measure engagements specific to each nonprofit. For example, the score can be based on amount, recency, or frequency of last gift. It can also take into account demographic codes, volunteer history, and event attendance. It is incredibly powerful and is a feature rarely seen in other software systems.

Avector recently added Social Profiles™ to the CRM system's list of features. Social Profiles allow organizations to add data from a donor's social media profile (Facebook, Twitter) to the existing donor profile to improve outreach, enhance the ability to map donor relationships, uncover valued social networks, and increase personalized service and communication.

Having the online portion "built in" to the CRM portion makes working with the two systems significantly easier than two separate products talking to each other.



### AVECTRA ROADMAP STATEMENT

Avector provides a rolling 6-month view of their product roadmap. In addition, through quarterly web-based meetings, surveys, online voting and/or their user communities, Avector provides the opportunity for customers to share input and feedback on the development plans. Examples of functionality prioritized in the 2013 release include (but is not limited to):

- Enhanced Batching
  - Accept additional transaction types: gifts, upgrade/downgrade, one time
  - Importing and storing supporting documentation
  - Additional auditing/reconciliation reports
- User Interface (UI)
  - Fresh "updated" look for development staff
  - Responsive UI techniques
  - User-configurable profiles
- Volunteer Module
  - Separate and enhanced volunteer management
  - Removing dependencies on community module



## AT A GLANCE

Vendor	Blackbaud
Platform	Salesforce and proprietary
On-premise or Cloud-based?	Cloud-based
Cost	\$1,000/month minimum

## DESCRIPTION AND PLATFORM

The Luminate suite is composed of two main products: Luminate CRM™ (LCRM), the constituent management database that includes analytics and reporting tools, and Luminate Online™, a web tool for creating websites, donation forms, and storing contact information. Luminate CRM is installed on top of Salesforce.com's Force.com platform. Luminate Online is a proprietary system formerly referred to as Convio Online Marketing. This total solution is cloud-based, which means only a web browser is needed.

## INTEGRATION

Luminate CRM and Luminate Online should be used together. While Luminate Online can be used without Luminate CRM, the reciprocal is not true. If an organization chooses not to purchase Luminate Online, they will still have a "shadow" instance of Luminate Online to ensure that Luminate CRM functions properly.

Data is exchanged between Luminate CRM and Luminate Online via an integration, which runs continuously to keep the systems in near real-time sync. As new constituents, constituent updates, event registrations and transactions are added to both systems, the sync is automatically executed every few minutes. The sync also deals with records that are merged or deleted in the CRM system to maintain the links to the records in Luminate Online. The integration is mostly hands-off once all fields are mapped between the two systems and the systems have been initially synchronized, a process called "equalization."

Luminate CRM features a powerful list building and reporting tool called Luminate Analytics™, which combines online and offline data, and also replicates the data for faster performance with large data sets. It has its own tools that allow for complex filtering beyond what is available in native Salesforce.com. When integration of online and offline data is in place, the reporting tool can aggregate both datasets. There is also a "replication" step that must take place before it is functional. This means that all the data in CRM is replicated into the data warehouse used for reporting.



The open application programming interface (API) allows clients to build Facebook applications and accept donations through Facebook. Luminare CRM also includes a social sharing feature which allows clients to quickly add sharing buttons to any page. There is the ability to allow Open Authentication so that users can log in using Facebook or other social sites.

## USABILITY

Luminare CRM is highly customizable, which enables role-based security that can restrict certain users' access to parts of the system outside of their responsibilities. Luminare CRM is built on Salesforce.com, which allows administrators to add custom objects, fields, and workflows, as well as customized reports.

Donation processing is well thought-out and is a strength of this suite, with well-built batch functionality and the ability to manage the types of gifts large nonprofits encounter every day, including in-kind gifts, recurring donations, pledges, stock, major gifts, grants and planned gifts. Special record types on the donation deliver particular fields to ensure that relevant fields and data are entered, depending on the gift.

Luminare CRM provides a large collection of out-of-the-box standard reports in addition to the ability to build custom reports and robust querying, which enables clients to quickly view their regularly-needed reports. By comparison, the Luminare Online reports are often slightly less functional than users would wish.

## COST

The Luminare suite includes account and contact management, donation management, volunteer management, event management, planned gift management, moves management (major donor cultivation) functionality, direct marketing (mail, telemarketing, included with email marketing), reporting/analytics (including a data warehouse), and peer-to-peer fundraising, which is a real strength of this suite. Pricing is based on the size of the organization and number of licenses. While pricing may vary, typically costs are at least \$1,000 per month.



## FUNCTIONALITY

Highlights of the suite's features include:

- Luminare Online supports all of the usual online marketing functions: donation pages, recurring gifts, pledge gifts, acknowledgment auto-responders, email blasts and e-newsletters. Email campaigns can be tied back to a donation to report on the success of an email.
- Luminare Online has solid ticketed event management functionality.
- Peer-to-peer fundraising is well-developed and is a real strength of the Luminare suite, allowing people to register as a participant or as part of a team.
- Multi-site/chapter functionality also is a strength of Luminare Online (called Multi-Center). Each site can have its own center, which essentially creates a wall so that the user only sees contacts, pages, and emails related to their own center. This helps make constituent viewing more accessible with large datasets, but still maintains the organization's territories. Site administrators have access to all records, regardless of location.
- It is important to know that Luminare Online does not support organization records, which forces donors to enter organizations into the system as individuals, and results in records in Luminare CRM that are structured as individuals but are really corporate donors. Customers typically resolve these records as they find them.
- Contact and household management is handled well in Luminare CRM. The built in hierarchy/relationships between households and accounts allows users to toggle between levels and manage interests, especially mailings, at either the contact or household level. This is especially helpful because it ensures members of households are managed individually and that multiple mailings are not sent to a household.
- Luminare CRM offers a standard acknowledgment tool that integrates directly with Microsoft Word. However, due to some glitches with Salesforce.com support of Word merges, many customers choose a third-party tool like Conga Composer.
- Luminare CRM uses the Campaign module to create campaign and appeal hierarchies. These must be applied to every gift and can be easily pulled into reports. Campaigns and other key fields must be mapped between Luminare Online and Luminare CRM for consistent donation processing.
- There is a standard volunteer management tool built into Luminare CRM; however, it does not integrate with Luminare Online as of this writing.



## HOW LUMINATE SERVES NONPROFITS' NEEDS

The Luminate suite functions well as a total CRM solution for large organizations with the trifecta of constituent/donor management, online marketing and analytics all strongly represented. Luminate Online is really the linchpin of the suite: The integration between Luminate CRM and Luminate Online is so deep that it really is best to use them together, which also provides the most value from Luminate Analytics. The full-featured nature of the suite means that it is best suited for organizations that can devote resources to its maintenance and development, and that users are supported with clear business process documentation and training.



### LUMINATE ROADMAP STATEMENT

In 2013 and beyond the product development efforts will continue to focus on giving customers access to the right information at the right time in the right place. Luminate CRM will focus on creating additional efficiencies with gift processing, online and offline communications, and deepened reporting functionality. There will be a continued emphasis on the integration of online and offline data through focusing on preventing errors and creating tools to enable organizations to resolve them. Through integration with Blackbaud Merchant Services, credit card account updates can be automated; this feature will save an organization time and effort and ensure a more streamlined gift processing flow. Improved workflow and navigation for reporting as well as additional self-service reporting and visualization tools will further extend the existing reporting tools.



## AT A GLANCE

Vendor	Blackbaud
Platform	SQL-based
On-premise or Cloud-based?	Either
Cost	Varies widely depending on versions selected

## DESCRIPTION AND PLATFORM

Blackbaud offers an integrated suite of systems with The Raiser's Edge and NetCommunity. NetCommunity is a Content Management System (CMS) that integrates directly with The Raiser's Edge, and provides nonprofits the opportunity to link their online fundraising and marketing efforts with their constituent management system housed in The Raiser's Edge. The Raiser's Edge is a well-known donor management system that provides extensive traditional fundraising management. Unlike The Raiser's Edge, NetCommunity is not a standalone system and does require the presence of The Raiser's Edge to function properly.

There are three versions of NetCommunity that are designed to meet varying levels of complexity: Spark, Grow, and culminating with NetCommunity Pro. Blackbaud offers hosting services for all of these tools, which can be a great benefit for organizations that want their systems off-premise for various reasons. However, an important piece to note is that cost may become a factor as the size of the databases increase. Alternatively, both products can be installed on-premise.

## INTEGRATION

The integration between NetCommunity and The Raiser's Edge is through a plugin created by Blackbaud that is part of The Raiser's Edge. The plugin allows the data entry staff to confirm whether a gift is coming from a new donor or a constituent already in the database. The Raiser's Edge uses adjustable criteria to evaluate duplicates and allows users to perform their own search of the database as well.

Data entry staff members download information, such as Donations and Event Registrations, into a Gift Batch, and also accept biographical changes initiated through Profile Updates. The types of transactions available for download by a user are as follows: Sign-up requests, Profile Updates, Fundraisers, Personal Pages, Donations, Volunteer Requests, Event Registrations, Class Notes, Polls, Memberships, Surveys and Advocacy Actions.



Most data only flow one way, from NetCommunity to The Raiser's Edge; however, if a constituent creates an online profile, The Raiser's Edge will link future gifts to his or her profile online, and the donor will be able to see his or her giving history (if enabled).

The Raiser's Edge offers standard integrations with commonly used office tools, such as exporting data to Excel and creating a letter from a constituent letter into Word. NetCommunity Pro can be linked with social media applications such as Facebook and Twitter. However, a third party application, Janrain™, needs to be purchased to enable single sign-on. Other tools that can be used are AddThis™, Disqus Commenting System™, Vimeo™, Flickr™ and YouTube™.

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INTEGRATION NOTE:  
BLACKBAUD IS PREPARING  
A SIMILAR PLUG-IN PRODUCT  
(FOR RELEASE IN 2013)  
THAT WILL STREAMLINE  
THE EXCHANGE OF DATA  
BETWEEN RAISER'S EDGE  
AND LUMINATE ONLINE.

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## USABILITY

Overall, these products are relatively easy to learn and use. The core feature set is strong, and with NetCommunity, general features can be built out quickly. If yours is a Raiser's Edge organization, the integration with NetCommunity is the most native option that doesn't require a custom connection to be built. Additionally, the link between the two enables great exposure of information and tie in.

Both The Raiser's Edge and NetCommunity require some technical expertise to manage. Depending upon the level of reporting and administration needed, The Raiser's Edge database administrator may require some SQL knowledge. NetCommunity management requires web technology knowledge such as .NET and CSS. The user who is responsible for managing NetCommunity must have a deep understanding of websites, HTML, etc. and be comfortable creating pages, parts, etc. An end user can make minor changes, but further customizations may require a developer.

## COST

The cost among these two products can vary greatly and there are a lot of contributing factors that may influence the cost. To start with, it is important to determine the core business functions that The Raiser's Edge will need to support as there are different modules within The Raiser's Edge that can be purchased (Tribute, Prospect, Event, Planned Gift Tracker, Volunteer, Membership), as well as three versions of The Raiser's Edge: the



original The Raiser's Edge, The Raiser's Edge(i), and The Raiser's Edge(i) Enterprise. Similarly, there are three levels of NetCommunity available; Spark, Grow and Pro, and each level offers different functionality. NetCommunity Pro has the top tier of functionality available.

## FUNCTIONALITY

Highlights of the suite's features include:

- Both The Raiser's Edge and NetCommunity have the functionality needed to produce segmented mailing lists for both print mail and email blasts. Additionally, The Raiser's Edge integrates with Blackbaud Direct Mail (a separate service) if your organization employs a higher level of complexity.
- NetCommunity donation pages allow constituents to select multiple transaction options, including recurring gifts, pledges, tributes, split gifts, matching gifts, and multiple designations, all of which flow into The Raiser's Edge. Offline, The Raiser's Edge has always had strong gift processing and auditing functionality; the event registration, pledge, stock, and planned gift functionalities are especially sophisticated (optional modules may be required).
- Event records can be set up in The Raiser's Edge and linked to a registration form in NetCommunity. Transactions are then downloaded through the NetCommunity plugin and information is stored in the Events Module as well as the Events tab on the constituent record. Event Invitations can also be sent through NetCommunity.
- NetCommunity enables a nonprofit to set up pages and postings for volunteer jobs and interests, which can be downloaded and linked to the Volunteer Module. This information will then appear on a constituent's record in The Raiser's Edge. The Volunteer Module in The Raiser's Edge provides basic functionality for recording information regarding your volunteers. If your organization has a robust constituency of volunteers and complex needs, this module may not meet all of your needs, though in many cases using the Volunteer Module is preferable to using an external system.
- NetCommunity no longer offers native team fundraising functionality. However, NetCommunity can easily co-exist with another team fundraising application. Integration between Friends-Asking-Friends and The Raiser's Edge is bi-directional (profile updates and gifts flow into The Raiser's Edge, and offline gifts are tracked in Friends-Asking-Friends, Blackbaud's peer-to-peer fundraising event solution, to ensure up-to-date team totals. Similar integration between The Raiser's Edge and Team Fundraiser (part of the Luminare Online suite) will be available in 2013.



- Blackbaud NetCommunity offers multisite functionality that is best suited for a chapter-based organization. It does allow multiple merchant accounts linked to different donation pages. However, the merchant account does not “stay” with a recurring gift transaction. The Raiser’s Edge does not have a specific multisite feature; however, many multisite organizations have successfully implemented it using various data sharing models.
- A full CMS is part of NetCommunity Grow and Pro packages, however, it relies on the presence of The Raiser’s Edge. The CMS allows easy linking of information and fields in The Raiser’s Edge. They allow optimization for mobile viewing of sites.

## HOW RAISER’S EDGE/NETCOMMUNITY SERVES NONPROFITS’ NEEDS

Overall, NetCommunity and The Raiser’s Edge focus on fundraising-related functionality and solidly meet the needs of medium to large organizations, with an exception for heavily team-based fundraising organizations. The best feature is their overall ability to support many business areas in a nonprofit philanthropy office. Neither product lends itself to customization, which may be a drawback for some of the more sophisticated organizations that have unique needs or are looking to manage mission-related pieces of their organization, but does make the product easier to support.



### RAISER’S EDGE/NETCOMMUNITY ROADMAP STATEMENT

Upcoming release highlights for The Raiser’s Edge include enhanced mobile functionality (support of organizational record updates and event management capabilities) and bi-directional integration with Luminare Online. Release highlights for Blackbaud NetCommunity include enhancements to event registration and email marketing.



## AT A GLANCE

Vendor	roundCorner
Platform	Salesforce and proprietary
On-premise or Cloud-based?	Cloud-based
Cost	Sold in tiers based upon number of users.

## DESCRIPTION AND PLATFORM

roundCause is a powerful nonprofit CRM system that is relatively new to the market. The tool is extremely flexible and can easily be customized with either a few small tweaks or additional applications. Because of its flexibility, roundCause can be used by large, complex enterprise organizations or can be easily scaled down to meet the needs of smaller to mid-size organizations.

roundCause is installed on top of the Enterprise edition of Salesforce.com and strives to have a "light footprint" in terms of its impact on the platform's original objects and codes. This allows it to be compatible with most of the applications available in the Salesforce AppExchange.

## INTEGRATION

roundCause integrates exceptionally well with Eloqua, a leading marketing automation platform, as well as several other online marketing automation and online tools (e.g., Kimbia, Silverpop and Drupal). The integration capabilities allow organizations to create mailings, set up marketing testing, receive donations via customized forms, and create mailing segmentation, which can then be synchronized back to roundCause contact records. Online gifts can be synchronized in real time or batch to roundCause. This creates a single, easily reconcilable source of reporting.

roundCause's Eloqua integration allows organizations to post social media widgets on their donation forms to track donor reposts. This information can then be synchronized back to roundCause and placed on contact and campaign records.

roundCause includes a tool called Social Publisher that allows users to promote their organization and programs on Twitter and Facebook, and within your roundCause orgs to other team members from directly within the tool. Because of its design, roundCause also is compatible with all social media integration apps currently available through the AppExchange.



## USABILITY

roundCause is extremely flexible and can be customized to deliver as much or as little automation and data entry as needed. Fields, workflows, triggers, and other customizations can be easily developed by a knowledgeable administrator in-house.

A highlight of the tool is its built-in help and training module, the roundCause User Guide. This comes standard with the tool and is updated by the vendor with each release. The feature also allows clients to make their own edits to the documentation to add instructions, screen captures and videos of customized business processes.

## COST

roundCause's cost depends on the organization size, based on the number of registered users. Annual license fees include basic support and maintenance: access to upgrades, the User Guide, issue resolution, and usage reporting, as well as access to roundData (see below), roundCause's advanced business intelligence and analytics capabilities.

## FUNCTIONALITY

Highlights of the suite's features include:

- Integration with Eloqua online and marketing automation tools allows organizations to track mailing list contact mail opens, click-throughs, and other reactions to mailings. A/B testing also is supported through a series of highly customizable reports and workflows. The results can be synchronized to roundCause and used to formulate future offline and online mailing campaigns.
- Online donation forms include one-time and recurring gift types and thank you gifts and are highly customizable. Forms can be deployed on an organization's own website or and can easily be customized to match an organization's branding very closely. If contacts already have a record in roundCause, the contact form can be automatically completed for them, which can improve turnaround time and donor ease of use.
- roundCause supports all standard gift types including major gifts, grants, gifts in-kind, stock, recurring gifts, and pledges. Soft credits also are supported with the option to differentiate the role and amount of credit by contact. Matching gifts can be easily managed by filling out a few simple fields, and roundCause also offers a wizard to simplify matching gift entry.



- roundCause can integrate with WealthEngine (at additional cost).
- A particular strength of roundCause is Giving Summaries. Each account and contact record features a giving summary section, which automatically updates as donations are entered. The giving summaries calculate the giving levels set by the organization, another example of the tool's flexibility. The giving level calculation is also done in real-time, so organizations can be sure their reports are always providing up-to-date information on their constituents' latest giving status.
- The Giving Summaries feed off of Affiliations, which is roundCause's solution to managing multisite/chapter organizations, or multiple business units within a large organization.
- Giving Summaries also support membership functionality, one of roundCause's key strengths. The membership functionality also supports the tracking of membership benefits (including merchandise).
- There are several options to generate acknowledgements via roundCause. Acknowledgements can be generated in the tool with the use of an additional application, Conga Merge™. If this tool is not installed, then acknowledgement letters can be merged through integration with Microsoft Word, or offline through a mail merge. Acknowledgements for online gifts can be generated through Eloqua if a workflow is set up. This can be very specific, based on the campaign, level, or other criteria set by the administrator.
- Because every field in roundCause can be included in a report, there is virtually no limit to what can be used to create mailing distribution lists. Customers also may install roundData™, an interactive data visualization tool, to create highly specialized mailing lists, reports and dashboards. De-duplication is a highlight of this tool and will help ensure mailings are sent only once to a constituent, even if he or she appears in the list multiple times due to meeting multiple criteria.
- roundCause enables users to enter and process payment information directly in the tool. roundCorner works with several payment processing vendors, including Sage, which is PCI-compliant. Donation information can be entered individually or expedited through a batch process. Batch entry allows users to bulk enter gifts from one screen. roundCause offers configurable batch upload matching criteria to minimize the chance of creating duplicate data during upload.
- roundCause's source code module is extremely powerful and could prove very beneficial to an organization with a complex coding system. These codes are set up in roundCause and can be added to campaigns to link both online donations and white mail to the appropriate source.



- roundCause comes with more than 200 standard reports out of the box. Custom reports are very simple and are based on the Salesforce.com drag-and-drop functionality. Dashboards also are available. For organizations with larger data sets, roundData, the data cleanliness and warehousing tool, can assist with analytics so that run times for reporting are not compromised.

## HOW ROUNDCAUSE SERVES NONPROFITS' NEEDS

roundCorner has worked hard to develop a highly-customizable enterprise-level product that also is accessible to mid-sized organizations. In addition to the available integration with Eloqua, roundCause integrates seamlessly with a number of other products to result in a well-rounded application whose functionality extends much further than can be achieved on the Salesforce.com platform alone. Membership management, to a deeper degree than is available with other fundraising apps, remains a strength of roundCause.



### ROUNDCAUSE ROADMAP STATEMENT

roundCause's 2013 roadmap includes major operational and feature enhancements to better serve our mid- and large-size nonprofit customers. Some of the major new capabilities scheduled for release this year include:

1. roundCorner just released a new, full-scale Event Management application including online registration, form builder, ticketing, seating, conference management and more. (Released April 2013).
2. Advanced data archival and retrieval, which provides configurable options for moving historical data to and from an operational data store external to Salesforce including real-time bidirectional sync.
3. Peer to Peer fundraising integration with best-in-class peer to peer (Run/Walk/Bike) platforms.
4. Social.com/Marketing Cloud Integration and Templates
5. Constituent Portal including authentication, preferences, biographical updates, gift management and communities.

# Springboard™ by Jackson River



www.jacksonriver.com

## AT A GLANCE

Vendor	Jackson River
Platform	Drupal and Salesforce
On-premise or Cloud-based?	Cloud-based
Cost	Free, plus professional services

## DESCRIPTION AND PLATFORM

Jackson River offers a different twist on creating an Integrated Suite with their Springboard product. Springboard differs from the other applications in this review in that it works by providing customized functionality on an organization's website via Drupal modules, and by exchanging data behind the scenes with Salesforce.com. Jackson River has designed Springboard to work with multiple Salesforce-based donor management apps, as well as with many email marketing tools. Since Springboard is quite product-agnostic, this summary is less about the Integrated Suite systems and more about how Springboard contributes to a uniquely custom integrated suite for each customer.

Jackson River believes organizations are best served by a "best of breed" model for fundraising applications. In other words, an organization will be more successful when it puts together the best CRM, email provider, analytics, content management and fundraising tools for its model and mission. To this end, Springboard's goal is to bridge the gaps between off-the-shelf applications and website templates in order for an organization to create customized functionality for its significant, unique business processes. Typically, a Springboard customer can get about 80% of its needed functionality with commercial packages, and Jackson River helps the organization create what they need to get the rest of the way there.

## INTEGRATION

By default, Springboard maps to the Nonprofit Starter Pack version of Salesforce.com. However, it can be adjusted to another donor management app, such as several of the apps mentioned in this report and in our 2012 report on The New World of Donor Management Apps for Nonprofits (<http://www.theconnectedcause.com/donorapps>).

As information enters Springboard, it gets batched into a queue, and enters Salesforce every 5-15 minutes. The system will alert administrators of any exceptions, such as missing required fields. Mapping constituent and transaction fields to Salesforce.com happens in the Springboard administrator area. Springboard can map to custom objects and fields



with minimal configuration done behind the scenes by Jackson River. (Note that there may be minor development costs for integrating Springboard with a managed package beyond the default of the Nonprofit Starter Pack.)

One unique feature of Springboard is something Jackson River calls “self-healing integration.” Administrators can set up rules to manage common data exchange exceptions. For example, if a donation form is mapped to an old Campaign, a processing rule can substitute another Campaign and allow the transaction to enter Salesforce with no exception. Or, if a new individual is added without a last name, a generic Last Name can be automatically filled in.

One thing to be aware of about the Springboard-Salesforce.com integration is that users need to be careful about merging duplicates in both systems in the same way so that the mapping between the records holds. Jackson River's Q2 release resolves this issue so that merges within Salesforce.com are seamless with Springboard.

It is important to note that Springboard is product-agnostic with email marketing systems in part because it does not exchange any data with those systems. Regardless of the email marketing product chosen by the organization, Springboard is not involved with the integration between the email service provider (ESP) and the CRM system (whether Salesforce.com or something else). Organizations should ensure that their CRM-ESP integration meets their needs when evaluating whether Springboard is the right fit for them.

Integration from Salesforce.com into Springboard is possible, but not common. Most of the product design has gone into the smooth transfer of data from an organization's website into Salesforce.com.

It is not uncommon for Springboard customers to use both Salesforce.com and a traditional offline system (for example, to run a high-volume direct marketing program), and Springboard will exchange data with both Salesforce.com and the offline system.

## USABILITY

Springboard is intentionally very modular: More than 35 standard modules are available, plus it is possible to build custom modules as well. This diversity is intended to allow customers to add only what they want, and nothing they don't.

## COST

The Springboard modules themselves are free (open source) and available for download (<http://www.gospringboard.com/download>). However, to install Springboard requires advanced Drupal knowledge and could take 40-100 hours depending on scope. Documentation can be found at [www.gospringboard.com/documentation](http://www.gospringboard.com/documentation), and



limited developer support is handled through drupal.org; however, Jackson River client support would be handled through the system implementer. For Jackson River clients, Jackson River's Managed Springboard™ offering provides full service support and management for Springboard and the client's best of breed applications. Additionally, Jackson River offers customers consulting services on Springboard in order to get the most out of the product.

## FUNCTIONALITY

Highlights of Springboard functionality include:

- Springboard capitalizes on the accessibility of Salesforce.com data by enabling dynamic gift strings on donation forms, auto-filling web forms, or automatically filling in a Congressional representative when a constituent clicks through from an email.
- One area of strength for Springboard is Jackson River's experience with accommodating multiple payment gateways on a website. There are many reasons why a website might need to accommodate multiple merchant accounts, such as routing donations to separate chapters of an organization, or using multiple accounts for capital donations versus operating donations.
- Springboard is fully localizable in languages, currencies and region-specific payment methods.
- Springboard offers a peer-to-peer fundraising module. The end user can customize their site with their own photos and create their own fundraising reason and story. The peer-to-peer Campaigns sync to a custom object in Salesforce.com.
- Donation forms are highly configurable, with many options available for hiding elements or selecting what should be tracked, such as source code or email source. Auto-responders for acknowledgements and confirmations also are configurable.



## HOW SPRINGBOARD SERVES NONPROFITS' NEEDS

With Springboard's focus on a customer's unique, mission-critical business needs, it fills a niche for organizations whose needs might be mostly met by off-the-shelf products, but have a significant outstanding requirement that may not be reasonably met by a packaged product. Springboard can be thought of as the "secret sauce" that allows an organization to extend the usage of off-the-shelf products by building out online functionality and then managing the exchange of data between applications to create a truly integrated, customized suite of products.



### SPRINGBOARD ROADMAP STATEMENT

Jackson River's product development team has big plans for the remainder of 2013. Here is a snapshot of the features currently scheduled for release this year:

- Advanced social interaction tracking
- Enhancements to Springboard's quick donate system
- Enhancements to Springboard's sustainer upsell and conversion components
- Additional test metrics for Springboard's fundraising A/B/n testing framework
- Improved bi-directional Salesforce.com integration (with support for contact merges)
- Team based fundraising additions to personal fundraising framework
- An entirely redesigned modern administrative user experience for fundraisers and marketers.



## GETTING STARTED WITH AN INTEGRATED SUITE

Now that you've read a little about Integrated Suites and the spectrum of tools in the marketplace, you may have identified a few that might be a good fit to help your organization take advantage of the data available in your scattered systems. If you're ready to move forward with implementing an Integrated Suite, we can help you do that. Our selection and implementation approach includes:

- Needs Analysis and Software Selection
- Business Process Review
- Data Migration to new systems
- System Process Documentation
- Customized Training

## GETTING STARTED WITH CRM PLANNING

If your organization has a more comprehensive CRM vision and wants to discuss how an Integrated Suite fits with that vision, Heller Consulting is ready to work with you. Our CRM planning approach includes:

- Work with you to develop a CRM strategy
- Review your operational model and business processes to ensure they will provide the data that will support the strategy
- Discuss and develop technical architecture that will enable tool implementation
- Help select and implement the tool itself

## YOUR NEXT STEP

To get going, gather your team leaders and complete our CRM Readiness Worksheet (<http://bit.ly/1100oxk>). This worksheet will help your team unite your understanding and expectations around your shared CRM vision and prepare you for more detailed discussions about how an Integrated Suite can put your organization on the path towards achieving it.

Then, call us at **800-794-0774** to schedule a time to review your internal assessment with us and determine the best next steps. We can help you with an assessment that will give your organization a complete roadmap for the future.



# THE CONNECTED CAUSE

The Connected Cause is a community that shares information about how nonprofits are using technology to connect with their supporters and deliver on their mission. Our contributors are knowledgeable and passionate about using existing and new technology to build and nurture nonprofit organizations.

As technology and the way we communicate evolves, CRM systems and social media are quickly converging. Our goal with The Connected Cause is to promote an ongoing conversation about this exciting convergence and provide insights that will help your nonprofit succeed now and in the future.

**Visit us at [theConnectedCause.com](http://theConnectedCause.com) today and join in the conversation.**



## HELLER CONSULTING

### ABOUT HELLER CONSULTING

Heller Consulting helps nonprofits streamline their operations and maximize their use of software and online communication tools for fundraising, marketing and mission management. The company specializes in software selection, implementation and optimization for fundraising, online marketing and Constituent Relationship Management (CRM) products. In addition, the company provides marketing services that help nonprofits plan and execute online and social marketing techniques that integrate with a nonprofit's CRM system for building and tracking an active community of supporters. With offices in San Francisco, Chicago and New York, the Heller Consulting team has helped hundreds of nonprofits nationwide.

**Visit us at [www.teamheller.com](http://www.teamheller.com).**