
Convio Common Ground™ and Salesforce Starter Pack: A Comparison

INTRODUCTION

Since its initial release in 2004, the Nonprofit Starter Pack (NPSP) – also referred to as “nonprofitforce” – has gained significant traction with nonprofit organizations seeking a constituent relationship management (CRM) solution. Now, with the availability of Convio Common Ground (CG), a web-based CRM system for tracking all interactions with donors and other supporters, nonprofits can choose between two solutions built on Salesforce.com's secure and reliable Force.com platform.

Idealist Consulting has delivered over 160 NPSP and CG implementations to nonprofit organizations, and has been trained and certified as a Convio Authorized Service Partner for CG implementations. With a deep understanding of both offerings, Idealist has prepared this guide, which compares and contrasts the two solutions, to help nonprofit organizations understand which system is best suited for their current and future needs. When new nonprofit offerings built on the Force.com platform become available, we will update this document as needed.

EXECUTIVE SUMMARY

Idealist's consulting team has reviewed CG and NPSP extensively, and has concluded that CG is one of the most well formatted Salesforce configurations for nonprofit organizations. Specifically, the addition of Visualforce coding enhances the user interface beyond the native “out of the box” functionality provided by Salesforce; the Account-to-Contact platform is intuitive to use; and the Contact Connector shows friendships and associations between contact records. CG is an attractive option for nonprofits looking to replace their donor database and take advantage of the Salesforce CRM platform. Considering the hours of development required to produce a comparable high quality solution, the monthly subscription (\$100 per user per month, with a two user minimum) is very reasonable. In short, Convio has done a tremendous job leveraging the Force.com platform to offer nonprofits a robust CRM solution.

The most recent release of NPSP is a considerable improvement over previous generations of the solution, and now allows users to leverage multiple options to accommodate constituent householding. Moreover, NPSP, offered at no cost to qualifying nonprofit organizations with 501(c)3 status, will fit every budget as long as the organization needs fewer than ten seats, is willing to accept a basic user interface, and can do their own customized configuration, data migration, user adoption, and training.

IMPORTANT CONSIDERATIONS

Although there are many web-based CRM solutions available in the market, NPSP and CG have been designed specifically with the needs of nonprofit organizations in mind. Both solutions are built on salesforce.com's Force.com platform, which means that regardless of the solution you choose, your organization will benefit from a secure, reliable product – accessible from any web-enabled device – without the infrastructure costs and related headaches of an on-premise CRM database. As a result, your nonprofit can focus on its mission, instead of managing and maintaining software and IT infrastructure.

When trying to determine which of these two solutions is best for your nonprofit organization, you should consider a number of factors.

PRICING

Both CG and NPSP may require additional costs for configuration, data migration, and training, depending on your organizational requirements and skill sets. It should be noted that the initial setup of NPSP generally requires the installation of several modules. As a result, some basic technical skills are required before the nonprofit can begin to use the solution. Overall, pricing can be broken down into several different components: base costs, implementation costs, training costs, and technical support costs.

Product License Costs

CG's pricing is straight-forward: \$100 per seat per month (with a two user minimum) for up to ten user seats; pricing for 11+ seats scales down from \$100. It is important to note that these licensing fees are not part of the gifted seat offered by the Salesforce Foundation. In other words, to access all of CG's functionality, you must pay the licensing fees that are established by CG. For this price, nonprofits receive a robust product, along with accountability from a vendor that works exclusively with nonprofits. Included in this monthly fee is support, training, documentation, and peer learning via Convio's online community. Additionally, Convio commits to ongoing innovation of the CG solution, with no less than three releases annually, each of which contains major new features (e.g. volunteer and event management) and enhancements to existing product features.

NPSP, through the Salesforce.com Foundation, offers up to ten gifted seats to eligible nonprofits that complete the application process successfully (a value of over \$15,000 per year). To be eligible, an organization must be registered as a 501(c)(3) and must exhibit a number of characteristics outlined by the foundation. (For complete criteria, please visit: www.salesforcefoundation.org/eligibility.) Any additional licenses above and beyond the initial ten are available at a discount of 80 percent. NPSP clients receive access to support, training, documentation, and peer learning via an online community. (This is a very active community and help is often provided within a day or two of the initial request. However, this is not commercial support, and should not be looked at as such. As a result, there is no guarantee that a response will be timely.) Additionally, the foundation averages two releases of NPSP each year, although the extent of these upgrades varies and may or may not contain major changes to the product.

Implementation and Training Costs

Whether you choose CG or NPSP, you will likely require some assistance with configuration, data migration, user adoption, and training. The related costs will vary depending on the number of staff you need to train, the condition and accessibility of your data, the complexity of your operations, and the implementation partner you choose. Typically, to meet a nonprofit's needs, NPSP will require more customization than CG. You may be able to decrease costs by foregoing a partner; however, doing so will likely mean that you must spend considerable time learning about implementation methodologies to ensure success.

Included in its monthly fee, CG offers regular web-based classes with a live trainer and an online resource center that includes on-demand professionally developed tutorials for administrators, new users, and consulting partners. Also available are various migration guides, technical references, release notes, and best practice guides. Tutorials for new functionality and additional details for non-standard use cases are released regularly. Additional generic training resources (not specific to CG) can be also found in the Salesforce help and training resources available to every Salesforce user.

Training and support for NPSP are available, but are slightly fragmented and not always nonprofit specific. Training is available through online tutorials, implementation partners, or the Salesforce.com Foundation's online resource page. Additional discounted onsite training is also available, but it is generic, which can be confusing if the user is expecting training tailored to the

requirements of a nonprofit organization. All courses held in North America are offered at a 50 percent discount off the list price to nonprofits and partners that serve nonprofit clients exclusively.

One way to receive training specific to your needs is to engage a partner to create user guides, tip sheets, and training courses that are tailored to your nonprofit's business processes. However, it should be noted that your organization could develop this collateral and training internally. To decide the best training option for your organization, consider budget, technical skill set, and availability of internal resources.

Technical Support Costs

The good thing about Salesforce (regardless of the platform) is that it is extremely stable and rarely requires technical support. Most technical support is due to functionality requests, training needs or configuration enhancements. In the event that you do require technical support, you'll find that support for both platforms is dependent on your support requirements. You may need to contact salesforce.com, the Salesforce.com Foundation, or your implementation partner – depending on the issue you wish to resolve.

Convio alleviates much of this communication by consolidating your requests during a single call. They will then route you to the appropriate contact if they are unable to address the problem directly. This service is rolled into the monthly user fee.

Due to the limited resources of The Salesforce Foundation, NPSP provides a Nonprofit Salesforce.com Practitioners (NPSF) Google group for general support questions. In most cases you will receive a reply that suggests the best course of action for you to take for your specific concern. Engaging a qualified Salesforce partner will help you navigate the options when you need support; however, depending on budget and skill set within your organization, it may not always be necessary. The cost of this support varies from partner to partner, but can be reduced significantly by selecting a Salesforce Nonprofit Partner or a Convio Authorized Serviced Partner. Visit the websites below for a list of partners:

- Convio Partner Website: <http://www.convio.com/cgpartners>
- SF Partner Website: <http://www.salesforcefoundation.org/partners/consulting>

FEATURES

NPSP provides organizations with a powerful CRM solution that has great potential to fulfill the donor and relationship management needs of a nonprofit. However, for many organizations, there are critical feature gaps and often a sizable upfront investment during the implementation phase to meet core requirements. CG closes a number of these gaps by providing many of the features essential to managing constituent relationships. The more robust feature set of CG decreases the amount of customization required, yet still provides the end user with flexibility to modify the system as needed.

Below is a more detailed look at specific features which are offered “out of the box”. (The list does not consider applications that are available on the AppExchange or that can be configured by adding code.) This report was based on the experience of Idealist consultants who have configured the salesforce.com platform for over 130 nonprofit organizations.

Key:

Provides basic functionality but additional development highly recommended = ☹

Provides satisfactory functionality but additional development required for customization = ☺

Little or no development required to meet standard organization requirements = 😊

Feature	CG	NPSP
Ability to integrate with Convio Event Management, Fundraising and Advocacy campaigns	☺,1,*	☹,1,*
Ability to easily switch architecture to accommodate other solutions	N/A*	☺,6
Application Integration Capability	☺	☺
Basic Reporting Functionality	☺	☺
Batching	☺	N/A
Bulk Receipting and Acknowledgment	☺	N/A
Certified Partner Support (configuration, data migration, user adoption and training)	☺	☺
Contact Connector (ability to show cross contact relationships i.e. friendships)	☺,2	☹
Fundraising: Pledges, Standard Donations, In-kind, Recurring Gifts, Matching Gifts	☺,4,7	☺
Grant Seeking	☺	☺
Householding	☺	☺
Mass Email Functionality Beyond Standard Salesforce Platform Offerings	☺,1,*	☺
Membership Management	N/A	N/A
Online and Offline Communities	☺	☺
Online Donation Integration with Credit Card Processing	☺,1,*	☹,*
Price	N/A	☺,9
Reporting LYBUNT and SYBUNT	☺,5	N/A
Soft Credit Capability	☺,2	☺
Split Donations	☺,3	N/A
Training	☺	☺,8
Upgrade Enhancements and Bug Fixes	☺	☺
Utilization of Visualforce for Enhanced User Interface	☺	N/A
Utilization of Apex code for Enhanced Automation	☺	☹
Volunteer Management	☺	N/A
Event Management	☺	N/A
Contact Relationships	☺	☹
Address Standardization	☺	N/A
Accounting Integration	☹,*	N/A,*

* Denotes a feature is available at an additional cost beyond user licensing fees.

1. NPSP clients can connect with Convio's online marketing products, but this requires some degree of integration expertise and has a cost associated with it.
2. CG offers a built in relationship management module that allows nonprofits to track links between any combination of individuals or companies. The soft-credit rule is particularly valuable because it enables an administrator to create a relationship link between two individuals, and then check a box to issue soft-credits for one when a donation is made by the other - automatically. This feature gives a nonprofit a holistic view of how a household is contributing to the organization, or the extent to which donor solicitors have influenced gifts.
3. CG offers a gift designation tool so that administrators can easily split donation amounts between two or more funds, each with a dedicated general ledger code for tracking in external accounting products. The designations can be customized to meet the needs of each organization and are utilized on all types of donations in the CG database.
4. CG offers a pledge management tool that includes an installment tracker, which enables an administrator to customize an installment plan per each donor's request (e.g. monthly, quarterly, etc.) and split each gift between several designations. Each designation then tracks back to a specific general ledger code in your organization's external accounting software to help keep close track of fund allocation.
5. CG offers more than 50 stock reports built-in, and because of how all of donations are structured in CG, it's easy to create LYBUNT (last year but unfortunately not this year) and SYBUNT (some year but unfortunately not this year) reports and forecast income.
6. NPSP offers the ability to switch between architectural models (account-to-contact or individual-account), thereby allowing for potentially more dynamic relationship tracking between your constituents. For information about this capability contact Idealist Consulting directly.
7. Batching capability:
 - a. Create a layout, picking fields
 - b. Save the layout and use it again
 - c. Select default values and set the fields
 - d. Select the donor
 - e. Create new Contacts from the interface
 - f. Flag rows that you have created
 - g. Save the batch in process, and return to it later
8. The Salesforce Foundation provides discounted (50%) live class training and free online training for nonprofits.
9. The Salesforce Foundation offers up to ten gifted licenses of NPE (valued at \$15,000 per year) to eligible nonprofits.

COMMUNITY

In addition to support and training resources, CG has a client community for sharing best practices, tips, ideas for enhancements, and solutions to common problems. This community is monitored by CG staff and contributed to by Convio staff, clients, and partners. They also hold a summit each year that focuses on all Convio's offerings for the nonprofit community.

The NPSP community is very friendly, supportive, and active, serving as both an educational and a help forum. The community is managed primarily through the NPSF Google group; just about any question about any aspect of the NPSP can be answered by the group's members. The response time is not immediate, but the answers are usually thorough and offer multiple solutions to a specific problem. Users, partners, and developers are all involved with the community. Additionally, salesforce.com supplements the community with its annual Dreamforce conference, offering registration discounts of as high as 90 percent for nonprofit users. This is a great learning and networking opportunity for Salesforce users in the nonprofit space. (The Salesforce Foundation is an integral part of Dreamforce.)

DEPLOYMENT DIFFERENCES

Both platforms aim to meet the fundamental CRM needs of a nonprofit so that organizations can get up and running as fast as possible. However, each solution takes a slightly different approach to achieving this vision.

Convio plans to embed all of their solutions directly into CG, allowing the nonprofit to leverage the functionality out of the box. The advantage to this module is that everything is readily available to the client; no additional searching or configuration is required.

Conversely, NPSP utilizes modules which the nonprofit can activate as needed. The advantage to this modular approach is that the nonprofit sees only the functionality that they wish to use; this can lead to faster user adoption and higher user acceptance rates.

MAINTENANCE, UPGRADES and BUG FIXES

Based on Idealist's experience, NPSP is primarily reactive to maintenance. Conversely, CG offers a more proactive approach, largely due to the fact that CG benefits directly from its innovation whereas the NPSP is offering a platform that is designed to be affordable.

CG offers scheduled predictable improvements and upgrades, which are delivered in two to three major releases each year. Major releases include significant new functionality, as well as minor enhancements to existing features. As needed, CG deploys patch releases to resolve bugs or address critical minor enhancements. Due to the proprietary nature of the product and the company's direct accountability to its paying clients, CG bug fixes will be addressed as needed by Convio. CG's robust features and Convio's commitment to ongoing product improvements provide evidence of direct accountability to clients paying to use the platform.

The open source nature of NPSP lends itself to a vibrant community that stays on top of any and all issues concerning bug fixes, upgrades, and improvements. The Salesforce.com Foundation attempts to address concerns quickly, but has to prioritize issues related to these three areas. As such bug fixes, upgrades, and improvements in NPSP might not be addressed as expediently as with CG, but with a user group community of over 600 members (number provided by one northwest), very little is missed.

SOLUTION INTEGRATION

CG integrates seamlessly with Convio's online marketing products (e.g., email marketing, fundraising, advocacy, event fundraising, ecommerce and more). Once again, due to the proprietary environment and costs associated with its products, Convio is committed to providing its clients with stable and reliable solutions. If a nonprofit organization wants integration between CG and Convio online marketing tools, it will not need to pay for Convio's CG DataSync Connector; however, there may be some configuration costs required for the syncing process. CG clients can also leverage the on-demand applications available through AppExchange. This flexibility offers CG clients the choice to use Convio online marketing products or another third-party product that might be better suited to the organization's needs.

Similar to CG, NPSP has the ability to link to the applications available through AppExchange. Also, NPSP clients can connect with Convio's online marketing products, but this requires some degree of integration expertise and may have a cost associated with it.

EVALUATION SUGGESTIONS

Selecting the right solution for your nonprofit requires due diligence. Look around the communities, obtain demonstrations of each offering, and contact users for references of each solution. The best place to start is:

- <http://www.convio.com/commonground>
- <http://www.salesforcefoundation.org>

Each of these sites offers online presentations, white papers, and forums for you to review your options and see which solution is the best fit for your organization. CG offers account executives that you can chat with if you prefer to speak with someone in person. Idealist recommends that you contact one of the Salesforce.com Foundation partners if you wish to speak directly to someone about NPSP. Moreover, Idealist recommends that you sign up for a trial of CG and NPSP before you make a final decision. Make sure not to fill out any application forms until you have committed to one solution over another.

Both NPSP or CG are very reasonable CRM solutions for any discerning nonprofit, even more so when compared to functionality and price of competing CRMs developed on a different platforms, such as Blackbaud, ACT!, Kintera, Sage (Millennium, FR50, FR100), , Excel, Access, Goldmine, Donor Perfect, File Maker Pro, eTapestry, ebase, Gift Tool, Gift Works, or Telosa Exceed. That said, if you are looking for a cross comparison of the Force.com platform with other competing CRM nonprofit solutions, you can read reviews at techsoup.org, NTEN.org, or Idealware.org. These comparisons are a bit dated, but they will provide a nice starting point for evaluation. For copies of these reports feel free to contact Idealist Consulting directly.

CONCLUSION

Although both CG and NPSP are built on the same tried, tested and well-supported Force.com platform, CG comes out ahead based on functionality, features, integration, user interface, and accountability. CG is well suited for mid- to large-sized nonprofits looking for a one-stop shop that integrates CRM (i.e. contact relationship manager, or database) readily with a CMS (Content management system for managing your website). It is equally as appropriate for small organizations that want a scalable solution which is simple to set up and implement, and which will grow as needs change. The exceptions to this recommendation is if you are a nonprofit organization with little or no budget; your organization does not require basic fundraising requirements; and you have technical staff members that can navigate the coding and customization necessary to build out all the functionalities you require that may not available in NPSP.

VALUE OF CRM TO NONPROFIT ORGANIZATIONS

When properly implemented and used effectively, a CRM system can have a significant impact on several areas of a nonprofit organization.

Organizational memory: Many nonprofits struggle with high turnover of staff and volunteers. As a result, important organizational memory that encompasses constituent interactions can be lost forever. To preserve this valuable asset, nonprofits are turning to CRM solutions to document all aspects of constituent interactions in a permanent way that provides a holistic view of the organization's relationships. In a nonprofit with multiple outreach channels (e.g., email, direct mail, telephone, face-to-face events) it is nearly impossible to leverage organizational memory in a meaningful way without a CRM solution. This need becomes more prevalent as an

organization's list grows and it becomes increasingly challenging to track the many interactions of hundreds or thousands of constituents.

Internal communications: Communications between a nonprofit's staff members are equally as important as communications with its constituents. To function effectively as a single organization, rather than separate entities and departments, a nonprofit should track various communication exchanges related to meetings and project management, while ensuring consistent terminology is used throughout the organization. Tracking such internal interactions will help to avoid duplicate efforts, while documenting the nature and progression of internal relationships. By using a CRM system as a "hub" that brings departments together, a nonprofit can gain insight into internal operations and interactions.

External communications: With a detailed history of constituent interactions in a CRM solution, a nonprofit can produce relevant communications based on actual data. Interests and other demographic information can be tracked and then used to segment an organization's list and produce targeted constituent communications. This increased level of personalization and relevance can be leveraged across all channels and will make constituents feel valued, which can lead to increased engagement and involvement with your organization. Knowing how you have communicated with your constituents in the past (and how successful these efforts have been) is essential to engaging your supporters appropriately and effectively in the future.

Tracking progress and success: Tracking the progress and success of your organization's various efforts (e.g., events, promotions, campaigns) not only provides insight into day-to-day operations, but also helps identify the best way for an organization to utilize its funds in the future. A CRM solution can track granular details around metrics used to measure success (e.g., tickets sold, funds raised, actions taken), making it easier to define an organization's future strategies and tactics using results from previous efforts as data points.

ABOUT THE AUTHOR

Idealist Consulting is dedicated to supporting nonprofit organizations through technical, organizational and promotional development. As a Salesforce Foundation and AppExchange partner we know that there is no better way to achieve this goal than through the adoption of Salesforce.com's CRM. With the help of the Salesforce.com Foundation, Idealist Consulting has delivered over 130 Salesforce implementations to nonprofit organizations dedicated to social services, environmental protection, business ethics, philanthropy, education, disaster relief, local government and others. Our rates are discounted for nonprofit organizations and we have numerous rate plans to help small and medium size nonprofits get started with Salesforce. All services may be provided in either English and/or Spanish. It should also be noted that Idealist Consulting is a registered b-corporation. This means that a portion of every dollar you spend with us goes to advancing corporate and environmental responsibility. For more information about Idealist Consulting and how we can assist you with your Salesforce.com implementation, please visit us at www.idealistconsulting.com or call 503-889-8832. www.idealistconsulting.com