5TH ANNUAL **convio** SU/\/\IT

OCTOBER 25-27, 2010
BALTIMORE, MARYLAND

Session #1024: Building a Social Advocacy Campaign on a Convio Open Framework

Presented by:

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Session Objective

- Demonstrate via working example a subset of the rich set of open platform interfaces Convio has to offer to make online marketing campaigns more flexible, compelling, and successful

- Show you some of the new APIs in action introduced in the Summer 2010 release
  - Advocacy APIs
  - Custom Interaction APIs
  - Open CMS APIs

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Constituent Scenario Walk-Through

Leveraging social media and open CMS to get your message viral
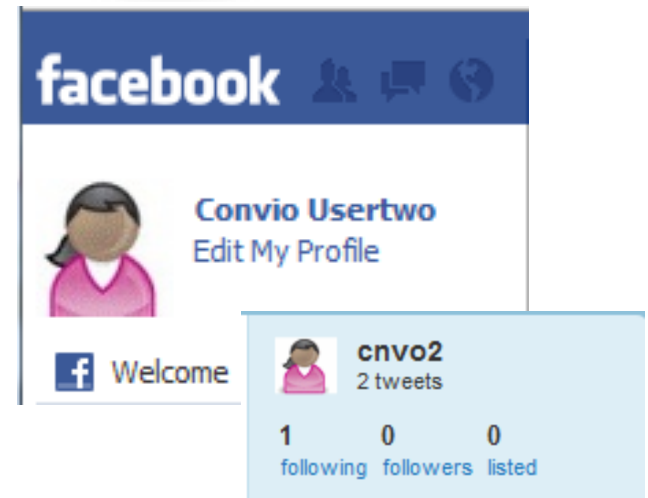
Advocacy End-To-End Scenario
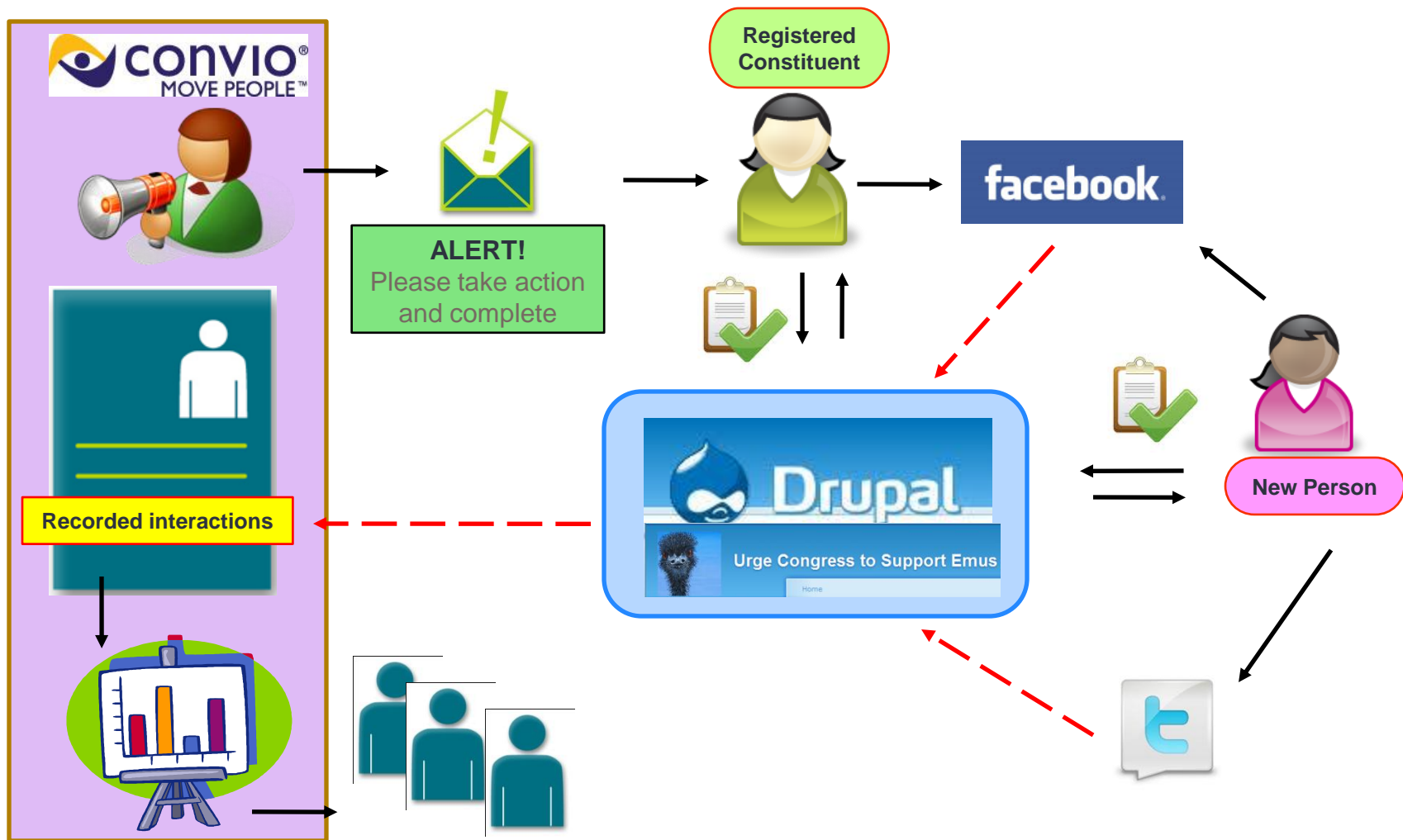
Advocacy End-To-End Scenario

- Organization directs registered constituents via email to a Drupal-hosted alert form to complete

- One constituent shares the alert via Facebook after completing

- Friend of the registered constituent sees the Facebook message, clicks to complete the alert

- Newly registered constituent is redirected towards a community message board, tweets a particular advocacy comment to share with followers

- Convio administrator gathers metrics via queries and reports to plan targeted follow-up campaign

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Our Sample Constituents

- Welcome user1 and user2! They both are friends, and socially active

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Starting Off

- Within Convio, create your action alert and email message

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Campaign Email Directs Constituents To Alert

Convio generated email

Drupal-hosted alert page

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Registered Constituent Logs In, Submits Alert

YOUR INFORMATION

Title:

First Name:
Convio

Last Name:
Userone

Email:
cnvo1.summit@gmail.com

Street 1:
11501 Domain Drive

Street 2:
Suite 200

City:
Austin

State:
TX

Urge

Navigation
▷ Groups

User login
Username: *

Password: *

Log in

Take action!

SUPPORT PRO-EMU LEGISLATION

Constituent profile info pre-populated from Convio via API call

Saves time, improves quality of data

Alert Is Shared To Facebook

You Are Here:

Friend Takes Action On Alert

facebook

Search

News Feed

Top News · Most Recent 1

What's on your mind?

Convio Userone Please read this and vote your support!
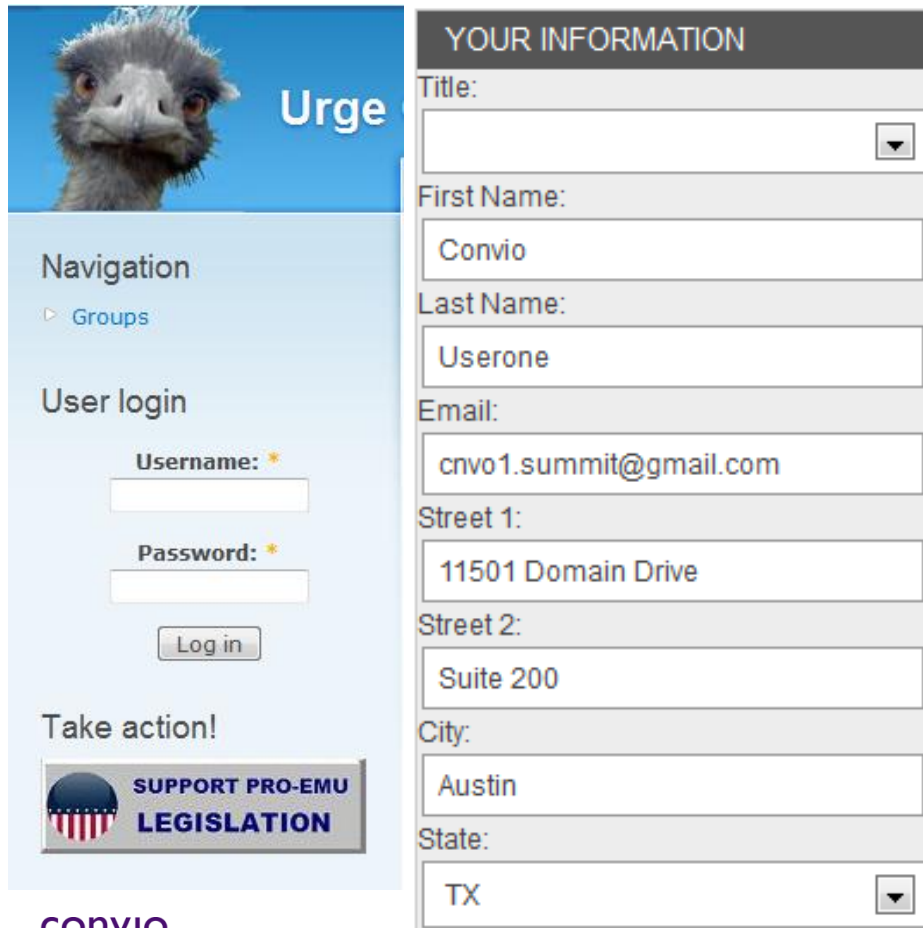
Emus in Peril
emuadvocate.info
Tell your representatives in Washingon that the time has come to support the aspirations of Emus in America and protect them from various indignities.

Convio Usertwo
Edit My Profile

f Welcome
News Feed
Messages
31 Events
Friends

Create Group…

New constituent clicks on link in Facebook to participate in action alert

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New Constituent Automatically Registered With Organization

Thank You for Registering Inbox | X

bounce.demo2@convio.com to me   show details 2:38 PM (1 minute ago)   ↩ Reply   ▼

Dear Convio,

Thank you for taking action to support Defend the Flightless at http://ptnr9.demo2.convio.com/site/PageServer. In order to make it easier for you to continue to support us, we have created a user name and password for you to use when you return to our site:

User Name: cnvo2.summit@gmail.com
Password: bin288cab

You can change your password or update your profile at any time.

Sincerely,

Defend the Flightless

New Constituent Registered In Convio With Origin Source Code

Convio Usertwo

📄 Add One Constituent 📄 Add Many Constituents Find Constituent: [   ] Go

Convio Usertwo

Contact Information

Convio Usertwo
cnvo2.summit@gmail.com

11501 Domain Drive
Suite 200
Austin, TX 78758
Home Phone:
Work Phone:
Mobile Phone:

Constituent Information Highlights

Origin Source Code: ec2-184-72-170-239.compute-1.amazonaws.com

Origin Subsource Code:Facebook

Audit Information

Creation Time: Oct 11, 2010 2:24:37 PM
Created By: cnvo2.summit@gmail.com
Modification Time: Oct 20, 2010 9:26:24 AM
Last Modified By: site_admin

Auto-populate origin codes for new constituent

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New Constituent Directed To Participate On Comment Board

Thank you for Standing Up for Emus!

Thank you for urging Congress to consider legislation protecting emus from exploitation. Working together, we can make a difference!

Please take a moment to share this page with family, friends, and colleagues, and help us spread the word. You can share one of the quotes below on Facebook or Twitter, or Click here to add your own quote.
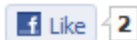
I really think Emus are Great!

Mon, 10/04/2010 - 21:12 — testuser

[f] Like 2   Tweet 0

Each year, over 11,000,000 are cruelly subjected to oil extraction. Many of them do not like it.

Fri, 10/01/2010 - 22:32 — testuser

[f] Like 2   Tweet 0

Tweeting One Of The Comments

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Gathering, Reporting, And Acting On Data

Leveraging The Data Collected

- Report on who responded to your alerts
- Create a query to identify constituent actions that occurred outside of Convio
- Create a group that targets constituents for a follow-up email campaign

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Mapping Custom Interactions To Constituent Activity

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Alert Activity Report

⊙ **Interaction Details**

Advocacy Alerts Information	
Action Alerts	
☑ Action Alert Description	☑ Action Alert Name
☑ Action Alert Type	☐ Allow Choice
☐ Behavior Type	☐ Created By

Report Results | **Report Configuration**

💾 🖨 ✋

Alert Activity Report
Constituents who have taken action on alerts

First Name	Last Name	Email	Accept Email	Action Alert Name	Action Alert Type
Hubert	Davis	smook+hubertdavis@convio.com	true	Save The Emus!	Normal Alert
Donald	Duck	smook+dduck@convio.com	true	Save The Emus!	Normal Alert
Erroneous	Rhodadenderon	smook+erhod@convio.com	true	Save The Emus!	Normal Alert

Custom Interactions Via Query

Origin Source Code Reporting

- Via constituent report filter

Segmenting Group for Targeted Communication

- From a report or query, create a group that includes everyone who took action on the alert, and also posted on the message board:

Walk through the steps to create report

Select Group Action: *
- ○ Select Existing Group
- ● Create New Group

Create a new group if desired and name it

New Group Name: *
Specify the name of the new group.

`ActiveSocialConstituents`

New Group Type: *
Select the type of the new group, or enter a new type to c[...]
- ○ Choose an existing value ▾
- ● `SocialSharing`

Create new group type for social sharing activity

New Group Description:
An optional description of the new group

Active in social sharing such as Facebook, Twitter, etc.

New Group Security Mode:
The Security Mode of the New Group.

No special security applies to this group ▾

New Group Security Category:
The Security Category of the New Group

General ▾

[Cancel] [<< Previous] [Next >>] [Apply]

New Group Now Exists For Segmentation / Mailing

Name	Actions	Type	Last Modified
ActiveSocialConstituents Active in social sharing such as Facebook, Twitter, etc.	Edit View Members	SocialSharing	September 24, 2010 5:07 PM

Advocacy Scenario Summary
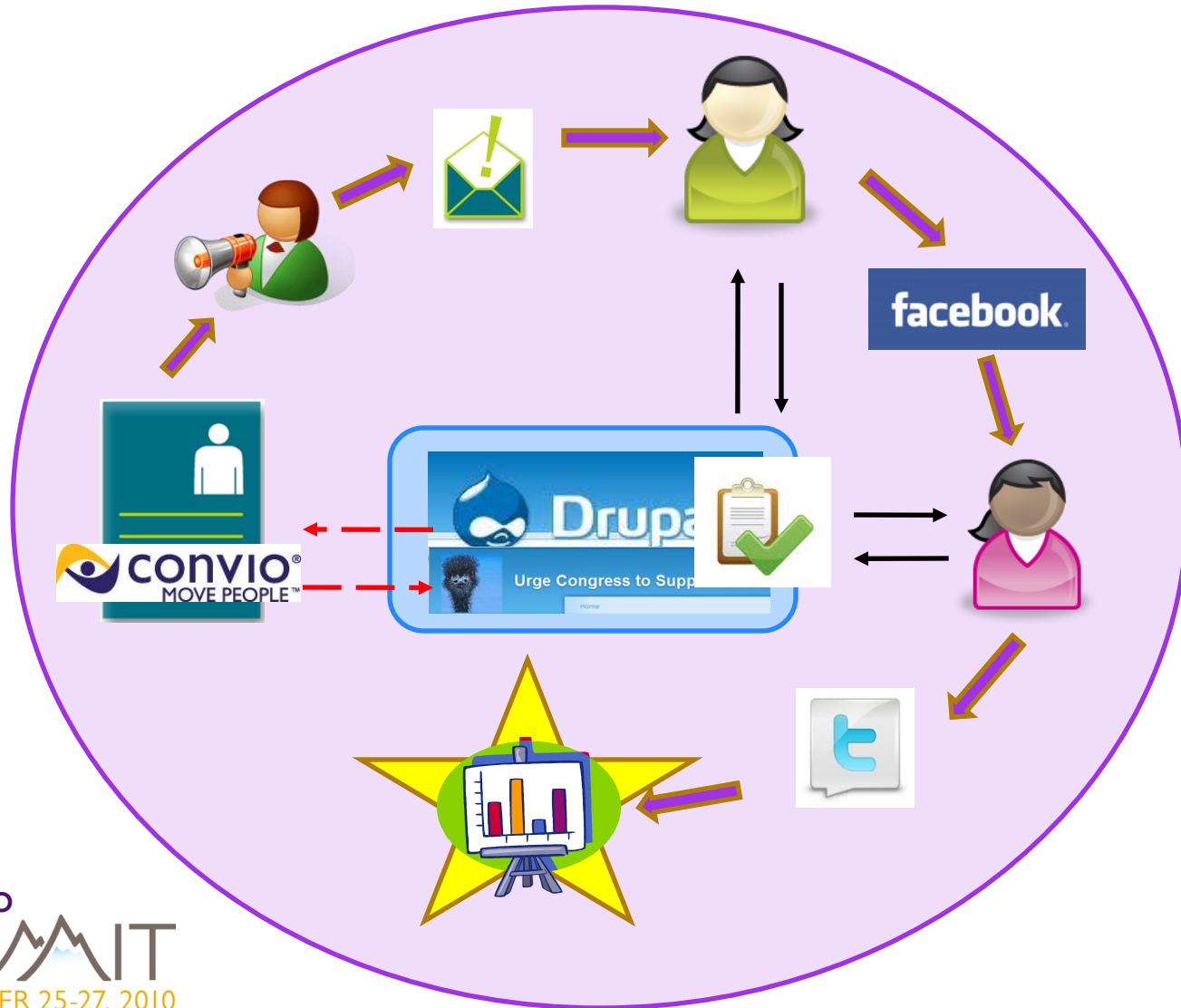
Under The Covers

For you code-slingers ☺

Requirements

Create a cloud-hosted site using Convio Open APIs as the centerpiece of an end-to-end advocacy campaign.

- Recognize logged-in users.
- Allow users to take action.
- Allow users to Like, Tweet and contribute content to the discussion.
- Grow our house list.
- Capture everything for reporting and segmentation.

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Cloud Hosting

- Create an account with a hosting provider (for this demo we used Amazon AWS)

- Provision a site instance (EC2 with Drupal)

- Site administration and configuration

- File system access for installing modules and customizing content

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Convio Open API Configuration

- API key
- Server API Administrator accounts
- Server API white lists
- JavaScript settings
- **Don't forget API Logs!**

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Specific Convio API Calls Used For This Presentation

- **`CRConsAPI:loginTest`**
  - Identify Convio user who is logged in our could be
- **`SRConsAPI:login`**
  - Log in a user
- **`CRConsAPI:logInteraction`**
  - Record constituent interactions with Facebook and Twitter
- **`CRConsAPI:getUser`**
  - Personalize page content and pre-fill forms
- **`CRAdvocacyAPI:takeAction`**
  - Execute alert, register if new constituent, log interaction

Other Modules & APIs used

- Drupal implementation is Bitnami stack hosted on Amazon EC2
  - http://bitnami.org/stack/drupal
- Drupal modules used:
  - Content Construction Kit (CCK)
  - Views
  - Organic Groups (OG)
  - Convio Integration API for Drupal
    - Download from http://open.convio.com/downloads
- Social Media APIs published by Facebook and Twitter

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Write your Congressman!

- Uses *AdvocacyAPI.takeAction* form

- If the user is logged in, we use the Convio Drupal module to pre-populate the form's name and address fields with the constituent's information.

- If the user is not logged in, taking the alert will also register them as a new constituent and log them in.

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Like

I really think Emus are Great!

Mon, 10/04/2010 - 21:12 — testuser

f Like 2   🐦 Tweet

1. Use the Facebook JavaScript API to share the message to constituent's feed, and process the callback

2. Use *ConsAPI.loginTest* to verify user is logged in and recognized

3. Use *ConsAPI.logInteraction* to log custom interactions for FB Likes

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Tracking Responses

- http://emuadvocate.info/drupal/node/5**?source=facebook**

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- Each URL shared from the site appends a tracking code

`http://emuadvocate.info/drupal/node/5`**`?source=facebook`**

- Code is parsed and passed on to Convio in the *sub_source* parameter of API calls that might create a constituent record (alert response)

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For every action, there is a corresponding custom interaction.

- Tweets, Likes, and posts log custom interactions in Convio.
  - All you need is a *cons_id*
  - For FB Like, you can hook the edge.create event
  - The "Official" Tweet button provides no event handlers – so we roll our own
  - Custom Interaction APIs are fraught with potential

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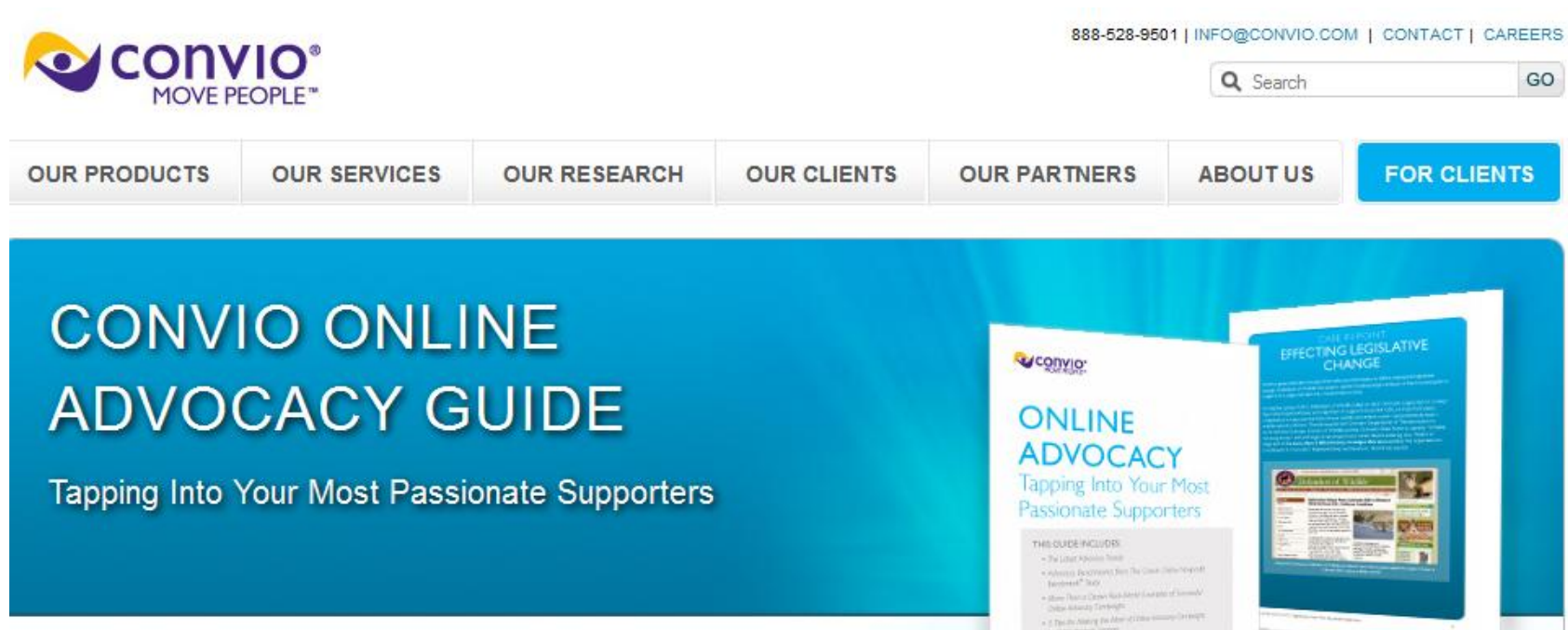
Wrap Up

Presentation material and notes available on **http://open.convio.com**
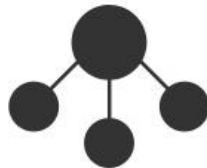
Additional Reference Material

- http://www.convio.com/signup/guides/advocacy-guide/online-advocacy-resources.html

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Convio Community Resources

- ## http://community.customer.convio.com
  - Forums for advocacy, open, etc.

Convio Communities

- Birds of a Feather
- NPO Thoughts
- Local User Groups
- CAB Forum
- Summit
- Convio Platform Products
- Common Ground
- Training
- Documentation
- Open
- Convio Go! Program
- Convio Strategic Services

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Thank You!

- Steve Mook – Program Manager, Open
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- Doug Fierro – Product Manager, Open
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- Session Evaluation Code
  - Text **1024** to **30644**
  - Or enter **1024** to this online survey form:

    http://www.conviosummit2010sessionsurveys.com