



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

Presented by:

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NO BOUNDARIES

# Session Objective

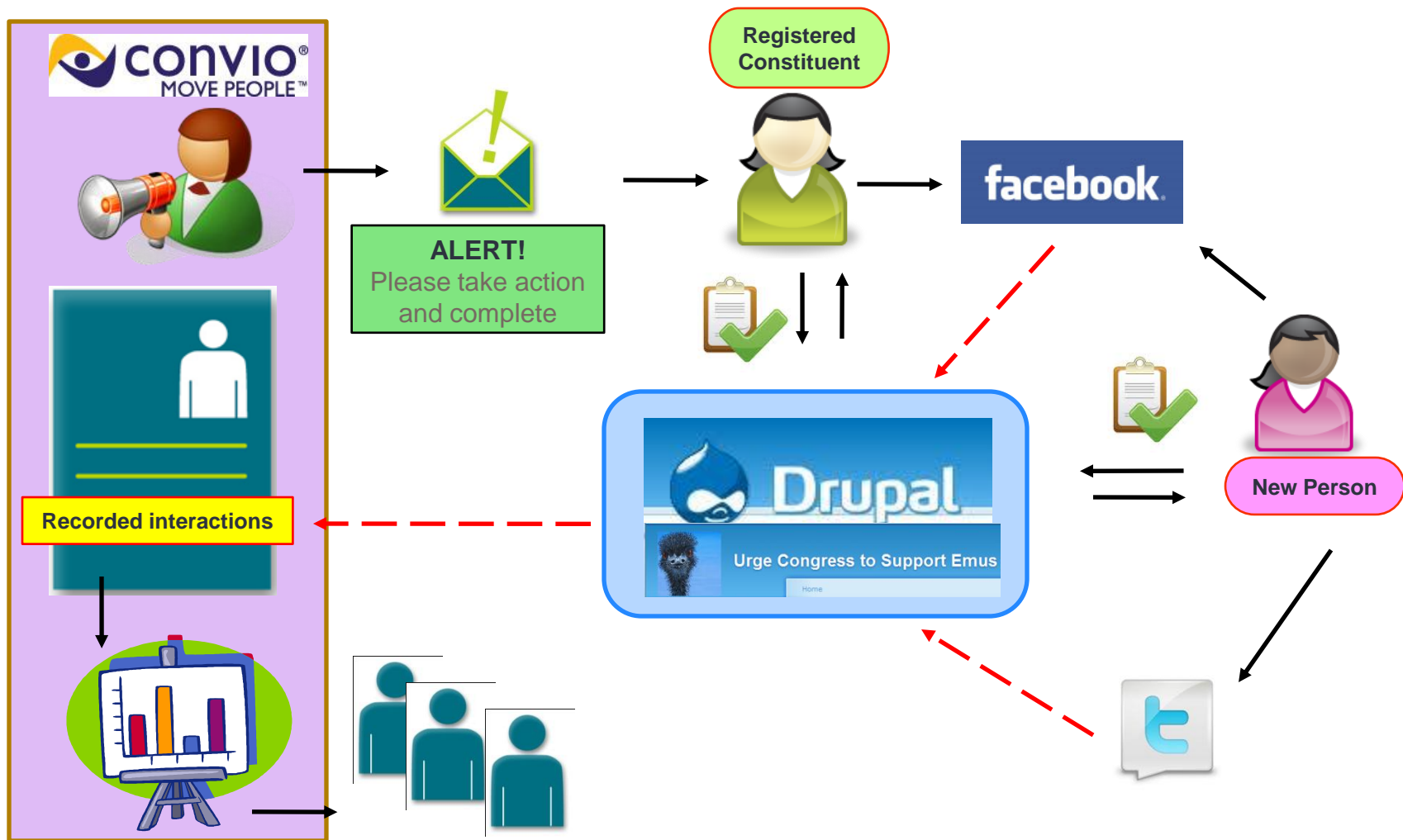
- Demonstrate via working example a subset of the rich set of open platform interfaces Convio has to offer to make online marketing campaigns more flexible, compelling, and successful
- Show you some of the new APIs in action introduced in the Summer 2010 release
  - Advocacy APIs
  - Custom Interaction APIs
  - Open CMS APIs

# Constituent Scenario Walk-Through

Leveraging social media and open CMS to get your message viral



# Advocacy End-To-End Scenario

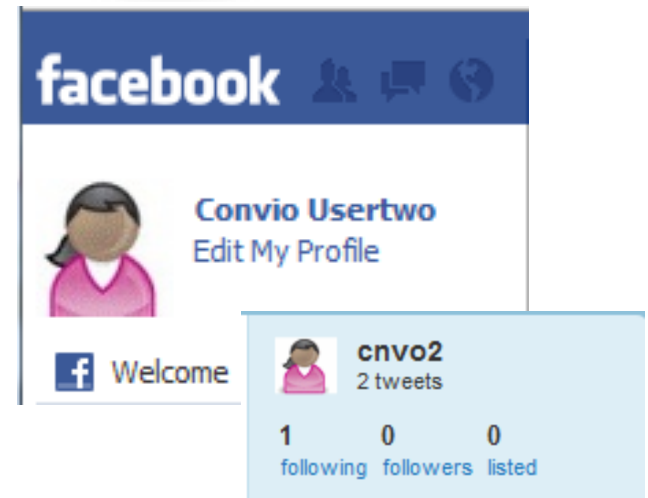


# Advocacy End-To-End Scenario

- 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

# Our Sample Constituents

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



# Starting Off

- Within Convio, create your action alert and email message

The screenshot displays two panels from the Convio web application. The left panel, titled '- Alert List -', shows a sidebar with 'Expand All' and 'Collapse All' buttons, and a list item 'All Advocacy Issues'. The main area shows 'Records 1 - 1 of 1' with a search bar containing 'emu' and buttons for 'Search' and 'Show All'. Below is a table with columns 'Alert ID', 'Name & Description', and 'Internal Name'. The table contains one row: Alert ID: 154, Name & Description: Save The Emus! This alert will be sent to existing members, Internal Name: a\_SaveTheEmu. The right panel, titled '- Message List -', shows 'Records 1 - 1 of 1' with a search bar containing 'emu' and buttons for 'Search' and 'Show All'. Below is a table with columns 'Message', 'Actions', 'Status', and 'Type'. The table contains one row: Message: Tell congress to save the Emus! sample email for Summit presentation, Actions: Copy, Delete, Archive, Preview, Send, Status: Approved (never sent), Type: Advocacy Alerts.

**- Alert List -**

Expand All Collapse All

All Advocacy Issues

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

emu Search Show All

Alert ID	Name & Description	Internal Name
Alert ID: 154	Save The Emus! This alert will be sent to existing members	a_SaveTheEmu

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

**- Message List -**

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

emu Search Show All

Message	Actions	Status	Type
<b>Tell congress to save the Emus!</b> sample email for Summit presentation	Copy Delete Archive Preview Send	Approved (never sent)	Advocacy Alerts

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)



# Campaign Email Directs Constituents To Alert

Convio generated email

« [Back to Inbox](#) Archive Report spam Delete Move to ▾ Labels

**Please tell Congress to protect the Emus!** [Inbox](#) | X

★ TEST MESSAGE FROM: flightless staff to me [show details](#)



Please fill out our action alert now to save the Emus!

<http://ec2-184-72-170-239.compute-1.amazonaws.com/drupal/node/5>

Thank you for your support.

[Unsubscribe from receiving email, or change your email preferences.](#)



[nonprofit software](#)

CONVIO  
**SUMMIT**  
OCTOBER 25-27, 2010



Drupal-hosted alert page



## Urge Congress to Support Emus

Home

Navigation

- Groups

User login

Username: \*

Password: \*

Take action!

**SUPPORT PRO-EMU  
LEGISLATION**

### Emus in Peril

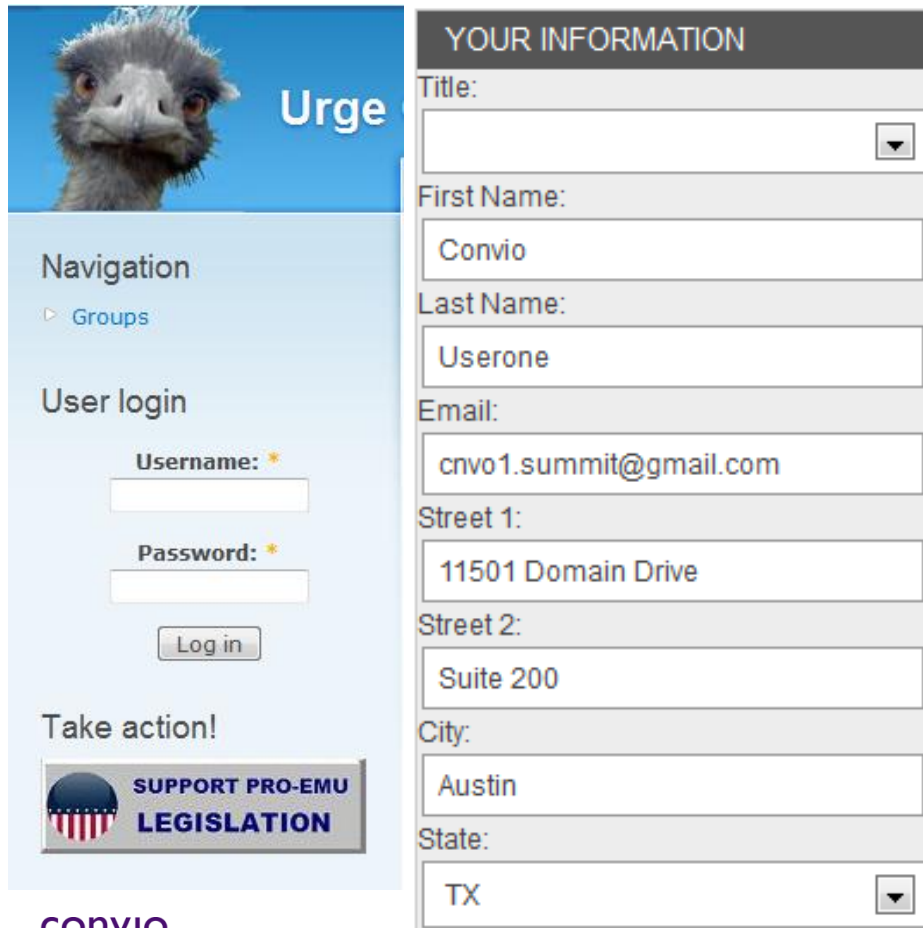


Tell your representatives in Washington that the time has come to Emus in America and protect them from various indignities.

Send this message to:



# Registered Constituent Logs In, Submits Alert



The screenshot shows the Convio Summit website interface. On the left, there is a navigation menu with a blue header featuring an ostrich image and the word "Urge". Below this, the "Navigation" section includes a "Groups" link. The "User login" section contains fields for "Username:" and "Password:", a "Log in" button, and a "Take action!" button with a "SUPPORT PRO-EMU LEGISLATION" banner. On the right, the "YOUR INFORMATION" form is pre-populated with the following details:

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



Constituent profile  
info pre-populated  
from Convio via  
API call

*Saves time, improves  
quality of data*

# Alert Is Shared To Facebook



## News Feed

[Top News](#) • **Most Recent**

What's on your mind?



**Convio Userone** Please read this and vote your support!



**Emus in Peril**  
emuadvocate.info

Tell your representatives in Washington that the time has come to support the aspirations of Emus in America and protect them from various indignities.

a few seconds ago • [Comment](#) • [Like](#) • [Share](#)

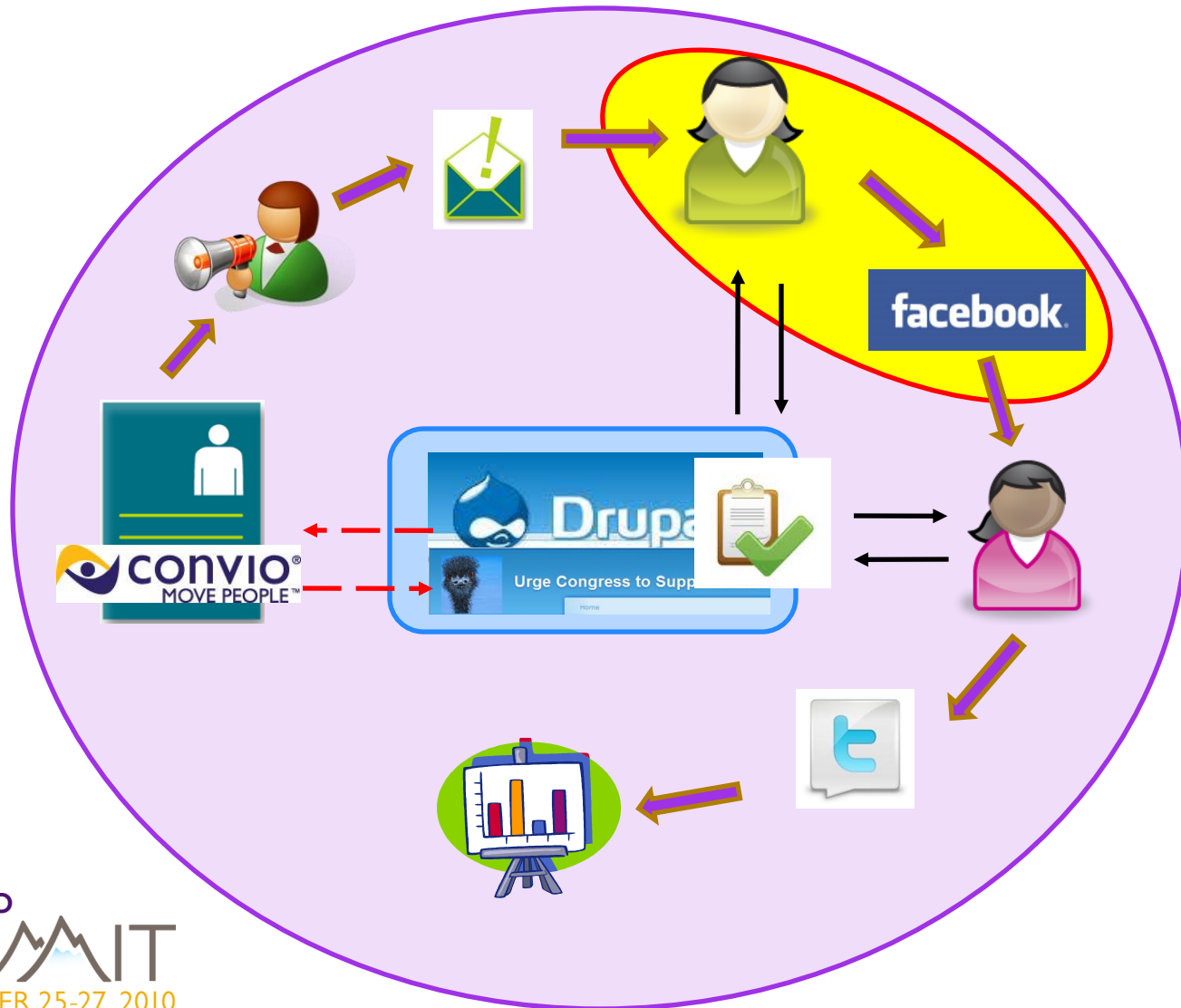
Take action!



Share

Tweet 0

# You Are Here:



# Friend Takes Action On Alert

The image is a screenshot of a Facebook interface. At the top is a dark blue header with the 'facebook' logo, navigation icons, and a search bar. On the left is a sidebar with the user's profile 'Convio Usertwo' and a list of navigation links: 'Welcome', 'News Feed' (highlighted), 'Messages', 'Events', 'Friends', and 'Create Group...'. The main area is the 'News Feed', which has a 'What's on your mind?' text box at the top. Below this is a post from 'Convio Userone' with the text 'Please read this and vote your support!' and a link to 'Emus in Peril' from 'emuadvocate.info'. The post includes a photo of an emu and the text: 'Tell your representatives in Washington that the time has come to support the aspirations of Emus in America and protect them from various indignities.' A red arrow points from a user profile picture in the bottom left towards the 'Convio Userone' post.

facebook

Search

Convio Usertwo  
Edit My Profile

Welcome

News Feed

Messages

Events

Friends

Create Group...

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 Washington that the time has come to support the aspirations of Emus in America and protect them from various indignities.

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

# New Constituent Automatically Registered With Organization



## Thank You for Registering Inbox | X

★ [bounce.demo2@convio.com](mailto: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](mailto: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](mailto: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

# 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.

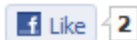
I really think Emus are Great!

Mon, 10/04/2010 - 21:12 — testuser



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





# Tweeting One Of The Comments

The diagram illustrates the workflow of sharing a Facebook comment to Twitter. It starts with a Facebook post by user '3mus Rul3z!' dated 'Fri, 10/01/2010 - 19:40' by 'testuser'. The post has 2 likes and 0 tweets. A red circle highlights the 'Tweet' button, with an arrow pointing to a 'Share this on twitter' dialog box. This dialog box shows the text 'Check this out: 3mus Rul3z! http://t.co/caOpNsl' and a 'Tweet' button. An arrow from this dialog points to a Twitter timeline. The timeline shows a tweet from user 'cnvo2' that says 'Check this out: 3mus Rul3z! http://t.co/caOpNsl' posted '37 minutes ago via Tweet Button'. The tweet is circled in red. Below it is another tweet from 'convio' about 'How to tell powerful stories online'.

3mus Rul3z!

Fri, 10/01/2010 - 19:40 — testuser

Like 2 Tweet 0

Share this on **twitter**

signed in as @cnvo2 not you?

Check this out: 3mus Rul3z! <http://t.co/caOpNsl>

You are sharing <http://ec2-184-72-170-239.compute-1.amazonaws.com/drupal/no...> using Twitter's URL shortener, [t.co](http://t.co). 92 Tweet

**twitter** Hon

What's happening?

**New!** Add a location to your tweets. [Turn it on](#) - [No thanks](#)

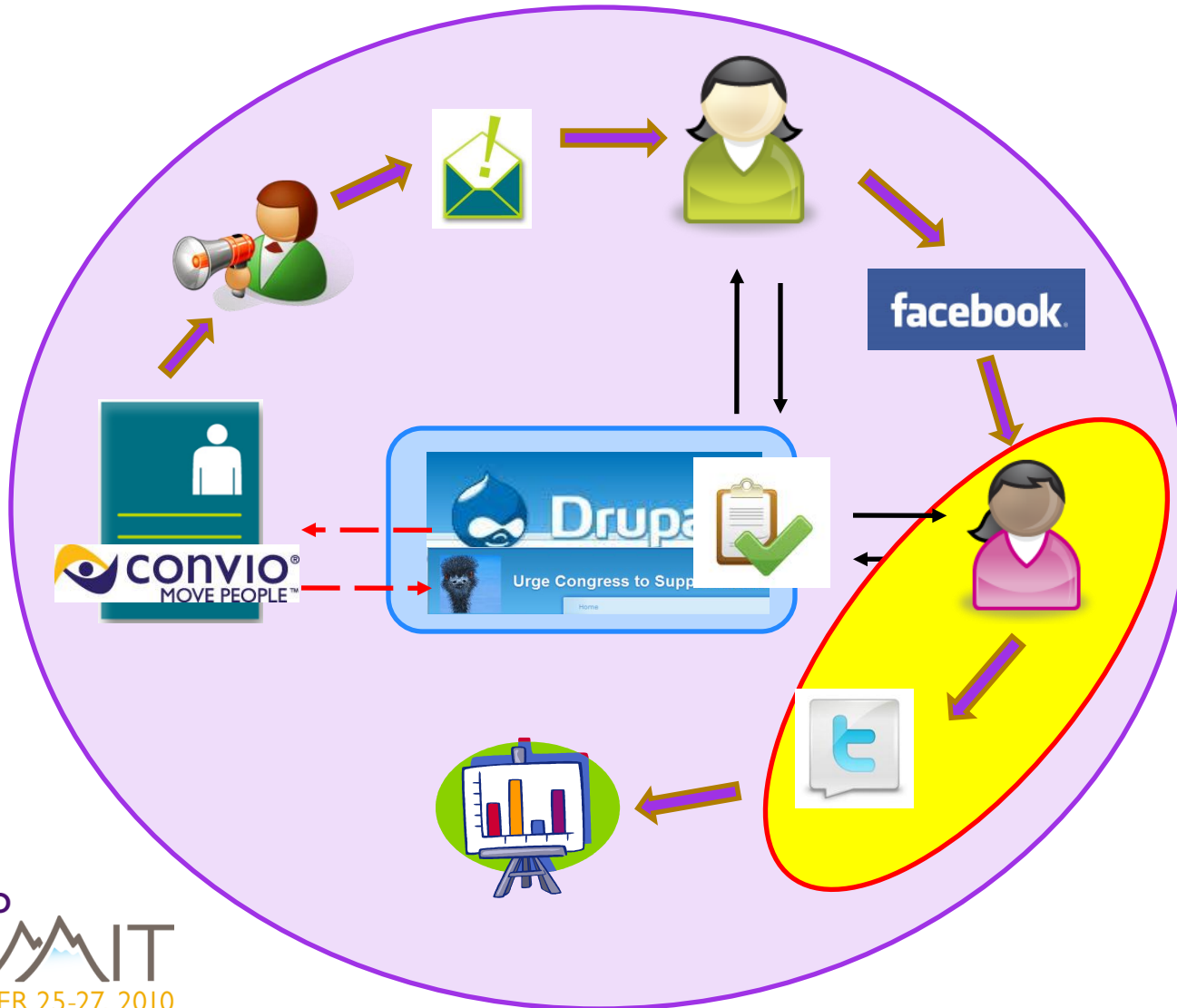
**Latest:** Check this out: 3mus Rul3z! <http://t.co/caOpNsl> 37 minutes ago

Home

**cnvo2** Check this out: 3mus Rul3z! <http://t.co/caOpNsl> 37 minutes ago via Tweet Button

**convio** How to tell powerful stories online. <http://slidesha.re/bDCncz> 11:55 AM Oct 8th via Spredfast

# You Are Here:



# 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

# Mapping Custom Interactions To Constituent Activity

Interaction Types List	
Records 1 - 3 of 3 <a href="#">First</a>   <a href="#">Previous</a>   <a href="#">Next</a>   <a href="#">Last</a>	
ID	Name
1000	Facebook Like
1010	messageboard
1001	Twitter Tweet
Records 1 - 3 of 3 <a href="#">First</a>   <a href="#">Previous</a>   <a href="#">Next</a>   <a href="#">Last</a>	

3mus Ru!3z!

Fri, 10/01/2010 - 19:40 — testuser



# Alert Activity Report

## Interaction Details

### Advocacy Alerts Information

### Action Alerts

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Action Alert Description | <input checked="" type="checkbox"/> Action Alert Name |
| <input checked="" type="checkbox"/> Action Alert Type        | <input type="checkbox"/> Allow Choice                 |
| <input type="checkbox"/> Behavior Type                       | <input type="checkbox"/> 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

Group	Interaction Type
Default Types	Facebook Like
Custom Types	Twitter Tweet
	messageboard

has interaction of type 'Facebook Like'

With subject:

Save Cancel






Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) |

facebook

<input type="checkbox"/>	Name	Actions
<input type="checkbox"/>	<a href="#">FacebookPosts</a>	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Run</a> <a href="#">Use Query</a> <a href="#">Rebuild Group</a>

## FacebookPosts

Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)


Actions	Name	Email
	Mook, Steve	<a href="mailto:smook+ptnr9@convio.com">smook+ptnr9@convio.com</a>
	Rhodadenderon, Erroneous	<a href="mailto:smook+erhod@convio.com">smook+erhod@convio.com</a>
	User, Test	<a href="mailto:devnull+testuser@convio.com">devnull+testuser@convio.com</a>
	Userone, Convio	<a href="mailto:cnvo1.summit@gmail.com">cnvo1.summit@gmail.com</a>
	Usertwo, Convio	<a href="mailto:cnvo2.summit@gmail.com">cnvo2.summit@gmail.com</a>



Records 1 - 5 of 5 [First](#) | [Previous](#) | [Next](#) | [Last](#)



# Origin Source Code Reporting

- Via constituent report filter

 Create a filter

Filter	Edit at run-time	Actions
Security Category ID is any of the following: Administrators only , Canada , General ,REQUIRED Local: Austin , Local: Boston , Local: Denver , Need to Read , new design , Registered users only , State: California , State: Maryland , State: Texas ,		<a href="#">Edit</a>
Origin Source Code Contains " facebook "		<a href="#">Edit</a> 
Origin Subsource Code Contains " facebook "		<a href="#">Edit</a> 

# 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:

The screenshot shows the Convio Summit interface. At the top, there are two tabs: "Report Results" (active) and "Report Configuration". Below the tabs, there are three icons: a save icon, a print icon, and a share icon. A red arrow points from the share icon to a "Social Sharing Report" section. Below this section is a table with the following data:

First Name	Last Name	Email	Constituent ID	Facebook Share Count
Convio	Usertwo	cnvo2.summit@gmail.com	1004927	0

Below the table, there is a button labeled "Add to Group". To the right of the table, there is a sidebar with a search bar containing "emu supporters" and a list of actions: "Edit", "Copy", "Run", and "Use Query". A red arrow points from the "Use Query" link to the "emu supporters" group name. Below the group name, there is a section titled "Use this query to" with three radio button options:

- ☐ Create a Mail-Merge list
- ☒ Create a Group
- ☐ Add Query Results to a Center

At the bottom of the sidebar, there are two buttons: "Go" and "Close".

# 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

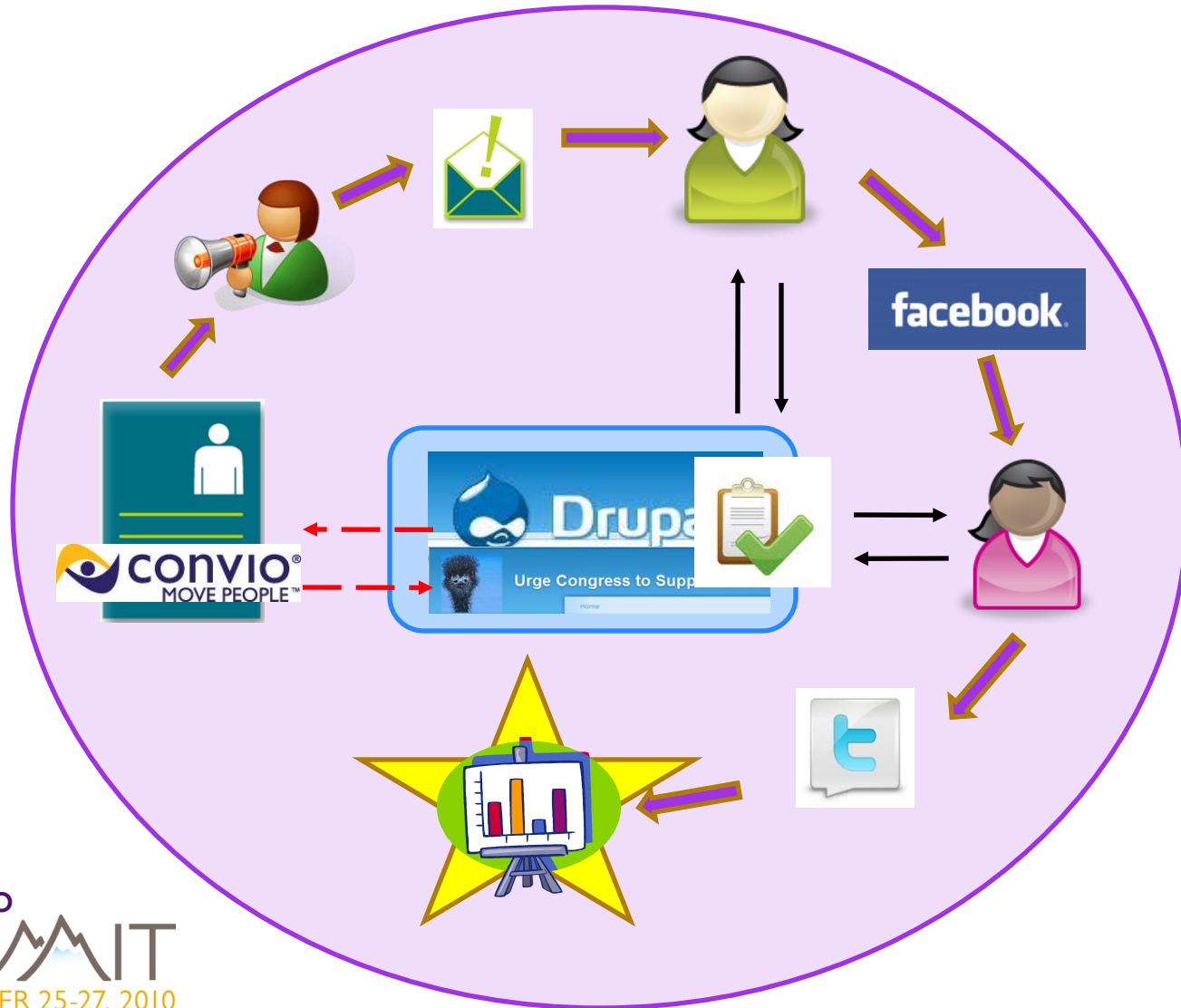
General

Cancel << Previous Next >> Apply

# New Group Now Exists For Segmentation / Mailing

Name	Actions	Type	Last Modified
<u><a href="#">Active Social Constituents</a></u> Active in social sharing such as Facebook, Twitter, etc.	<a href="#">Edit</a> <a href="#">View Members</a>	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.





# 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



# Convio Open API Configuration

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

# 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



# 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.



# Like

I really think Emus are Great!

Mon, 10/04/2010 - 21:12 — testuser



2



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



# Tracking Responses

 **News Feed**

[Top News](#) • **Most Recent**

What's on your mind?




**Convio Userone** Please read this and vote your support!



**Emus in Peril**

[emuadvocate.info](http://emuadvocate.info)

Tell your representatives in Washington that the time has come to support the aspirations of Emus in America and protect them from various indignities.

 a few seconds ago • [Comment](#) • [Like](#) • [Share](#)

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



- 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)



Source Code: emuadvocate.info  
Subsource Code:facebook



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

# Wrap Up



# Presentation material and notes available on <http://open.convio.com>

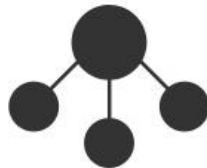
[OUR PRODUCTS](#)[OUR SERVICES](#)[OUR RESEARCH](#)[OUR CLIENTS](#)[OUR PARTNERS](#)[ABOUT US](#)

Convio Open

[APIs](#)[Web Services](#)[Downloads](#)

## Sky's the limit

Convio Open helps nonprofits tap into the power of the new Web, with new tools for social media, rich Web applications for a more compelling constituent experience, and new integration options to more effectively manage data.



APIs

Customize Convio



Web Services

Synchronize with Convio

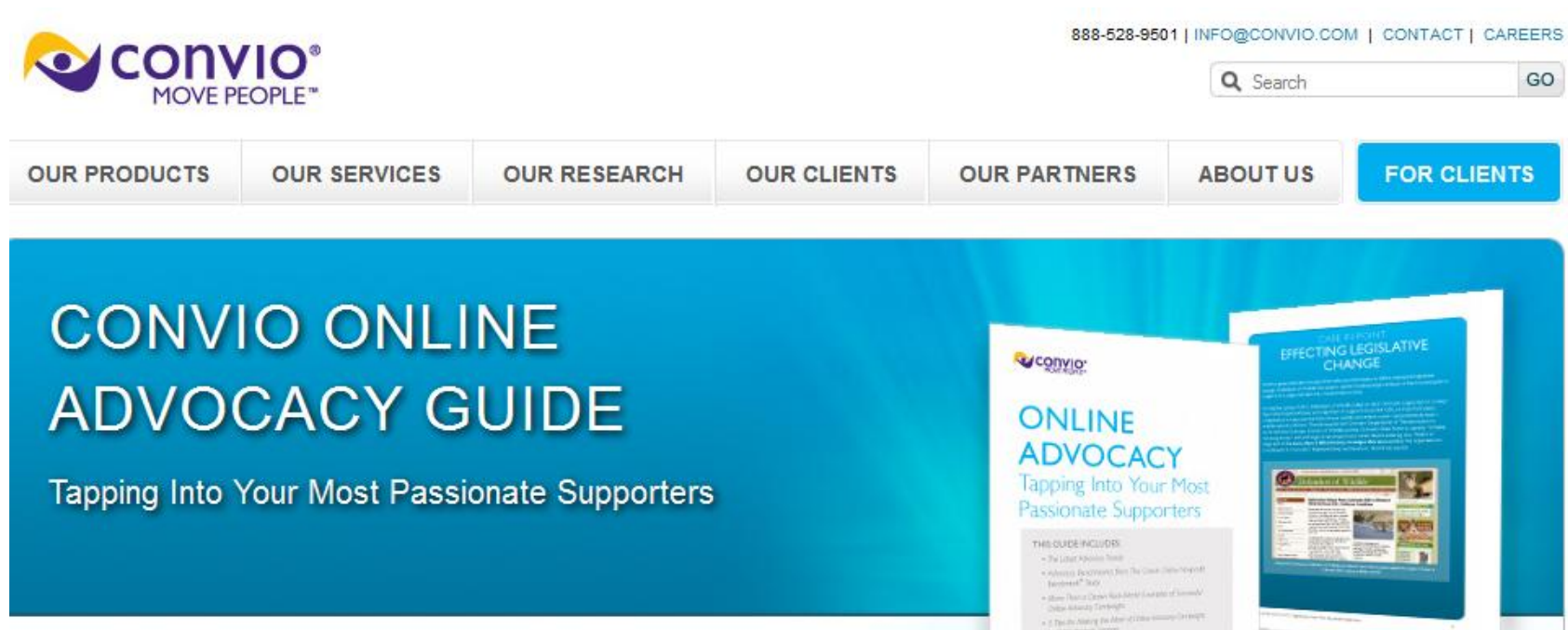


Downloads

Extending your reach

# Additional Reference Material

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



# 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

# Thank You!

- Steve Mook – Program Manager, Open
  - smook@convio.com
- Doug Fierro – Product Manager, Open
  - dfierro@convio.com
- Session Evaluation Code
  - Text **1024** to **30644**
  - Or enter **1024** to this online survey form:  
<http://www.conviosummit2010sessionsurveys.com>