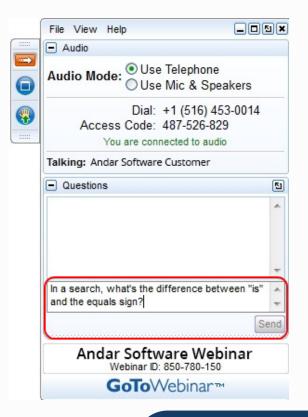
Andar/360 & Constant Contact Email Marketing Integration



Just so you know...

- We are recording, and you will receive the recording via email
- Everyone is in listen-only mode
- Use your chat box to submit questions
- The Q&A will happen near the end of the presentation





Your Presenters



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Agenda

- 1. Marketing Integration Overview
- 2. Productivity through Efficiency
- 3. Andar/360 and Constant Contact Overview
- 4. Live Demo
- 5. Q&A



Marketing Integration Overview

Marketing
IntegrationThe Application
of theConstant
ContactLive
DemoQ&AOverviewIntegrationOverviewOverviewDemo

The Andar/360 and Constant Contact marketing integration allows you to:

- Create efficiencies with fewer manual processes
- Foster alignment between teams
- Develop donor journeys, personas, and increase awareness of individual interests using email analytics



Marketing Integration Overview

With the marketing integration, you can address:

Marketing strategy

How marketing informs strategic direction, and brings awareness to donor interests and behaviors

Collaboration

Donor interests

Breaking down silos and fostering collaboration where email marketing supports donor relationship building Analytics supporting targeted communications based on interests



Andar/360 & Constant Contact

Productivity through Efficiency



Andar & Constant Contact: Productivity through Efficiency

Current Process

Utilize Andar and Constant Contact (CC) as main tools for Engagement

• Newsletters, Solicitations, Events, Announcements

Segmented Lists

- Andar Scheduled DMO's by filters
- Manually Downloaded Andar/Uploaded into CC
- (38 Lists, 25,000+ Accounts)

Maintenance of Data

- CC automatically excludes bounced backs from communications
- Andar manually update
- (1,981 bounced backs last qtr)

Tracking Donor Interests

- CC tracks click throughs
 - Not currently analyzing this data b/c info. only lives in CC

Workflow

- 3 departments manage manual download/uploads
- 3 departments manage data maintenance
- Process is inconsistent due to complexity of training w/staff turnover

New Process

Fully utilize Andar's automated processes to advance engagement strategies through CC

• Focus on engagement strategies and analyzing data vs. management of data

Segmented Lists w/Scheduled DMO's

• Bi-directional

Maintenance of Data

• Bi-directional

Tracking Donor Interests

• Bi-directional

Workflow

- Eliminates manual work and increases staff capacity
- Offers instant management of lists/numbers/reporting with Power Dashboards
- Provides stable marketing engagement process for continuity with staff turnover
- Tracking constituent interests supports organizational goals to pivot marketing messages real-time
- Focus on engagement strategies and analyzing data vs. management of data

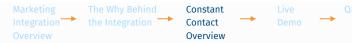


Andar/360 & Constant Contact

Let's review everything you need to know about the latest marketing integration



Andar/360 & Constant **Contact Overview**



Capitalize on . marketing analytics

Marketing Integration

Send email campaigns

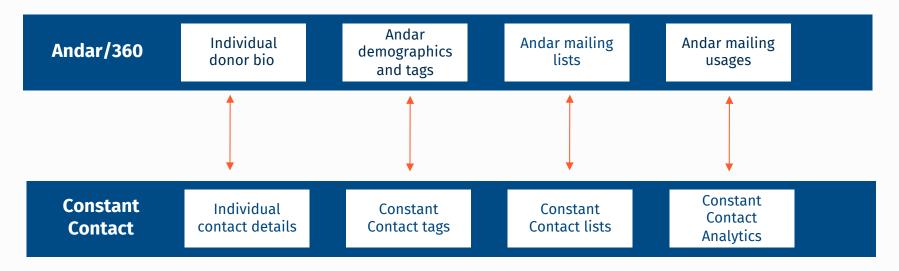


Develop mailing lists

Constant Contact Overview



Aligning Andar/360 and Constant Contact:





Andar/360 and Constant Contact

Step 1: System Preferences

of Preferences	_		×
Search System Window Help Q. Search accounts (F9) 🖬 Add			
Q Search Preferences			
Preferences Email Marketing Integration			
> Personal Preferences			
Workstation Preferences			
System Preferences Mailchimp Integration			
• General			
Andar Reports			
> Campaign Malchimp APIKey	Test Co	nnection	
Community Building Data Quality Maichimp Host Prefix			
New Accounts Warehouse			
> Email Email Preferred Type Work Email ~			
GerPledge Address Preferred Type Street Address			
Environment Check for activity and tag updates every 60 minutes			
• Events			
Instance New accounts on mailing lists are added with a subscribed status			
FAccess Note: Only applies where the new account was not added via a subscription			
Inventory Management Email Marketing Integration			
Outbok Connector Outbok Connector			
Pecking Orders and Default Types Fable Constant Contact Integration			
Phone Numbers			_
Receipts			
> Salesforce Integration Constant Contact Secret Key			_
Security Authorize Test Connection			
Surveys Table Structures Check for updates in Constant Contact every Z minutes			
Constant Contact New Accounts Warehouse ConstantContact			
Example Email Preferred Type Personal Email			
Web Reports Home Address Preferred Type Street Address			
Work Address Preferred Type Individual Work Address V			
work Address Preferred Type			
Other Address Preferred Type Seasonal Address 🗸			
Segment Maling List CC General Segmentat 🗸 🗸 Constant Contact General Segmentation List 🔍 Q + 💈			
Report Authority Apply	Update	(a	incel
κεμοιτ Αυτιοική Αμμη	opuore		

System > Preferences > Email marketing integration

Select "Enable Constant Contact Integration"

You will be provided an API key

Choose how often you'd like Andar checking for updates from Constant Contact

Andar/360 and Constant Contact

Step 1: System Preferences

0	API Docs API Reference	API FAQs	My Applications
Andar	Integration		
App Do	etails		
Created	i Nov 8th, 2021 at 2:41 PM E	ST Last Upda	ted Nov 8th, 2021 at 2:45 PM EST
API Key			
Rate Lim	nit: 10,000 requests per day ar	d 4 requests pe	er second.
a6009	9d97-8764-42ae-86eb-5fa5	i5ee1eb6c	Generate Secret
Redirect	t URI		
The auth	orization server sends users	nere once they	grant access to this app; default redirect is https://localhost.
http:/	//localhost:*/ccauth		•

Login to Constant Contact > My Applications

Paste the API key and generate secret, required input into Andar preferences

Redirect URI is provided

Andar/360 & Constant Contact

Step 2: Building mailing lists

Mailing lists in Andar

⋟ Maintain Mailing List Board Members						
Search Sy	stem Wind	low Help Q Search account				
-						
Notes	Ind. Acct.	Individual				
	75	Weeks, Ms. Elaine R.				
	141 Anderson, Ms. Dawn					
	182	Andersen, Mr. R.				
	208	Auciello, Dr. Vince				
	265	Boyd, Ms. Fiona				
	273	Breckles Jr., Mr. Bob B.				
	315	Di Paola, Ms. Carmen				
	331	Carr, Mr. Bruce J.				
	430	Definney, Ms. Irene				
	497	Forsythe, Ms. Jane				
	547	Glencross, Ms. Erica				
	562	Hume, Dr. Ian R.				
	570	James, Mr. Alfred				
	588	Jacob, Mr. Hans				
	661	Kerswill, Mrs. G. K.				
	695	Kwan, Mrs. Sally				
	729	Langevin, Ms. Cheryl				

17 Board members in each list in this example

Add or delete a board member from a mailing list in one system and they'll no longer be represented in the other

Change their name or email address in one and have it auto-update in the other

Lists in Constant Contact

	I Members ★ Nov 8, 2021		
17 Conta	All Contacts 🖌		
	Email Address 🛧	First Name	Last Name
	ajames@demo.andar360.com	Alfred	James
	bbreckles@demo.andar360.com	Bob	Breckles
	bcarr@demo.andar360.com	Bruce	Carr
	cdipaola@demo.andar360.com	Carmen	Di Paola
	clangevin@demo.andar360.com	Cheryl	Langevin
	danderson@demo.andar360.com	Dawn	Anderson



Andar/360 & Constant Contact

Step 2: Linking mailing lists

List Name	01 Board Members	
List Description	Board Members	
List Status	Active \vee	\frown
Constant Contact List ID		<u>ि</u> २

List ID	List Name
9b2bcf14-40f9-11ec-9df3-fa163eb2ef2e	Board Members
07a996e8-411e-11ec-acf3-fa163e911793	Current CEO's
740463b2-40e3-11ec-934d-fa163e91179	Annual Meeting
bffec4e4-411d-11ec-979c-fa163ee7c533	Current Leaders
fc37479c-411d-11ec-8d92-fa163e2743c5	Campaign Coordinators
abc7e2d4-3e71-11ec-86a5-fa163ee2c965	General Interest
a874eff6-4113-11ec-9f7d-fa163edfe46d	Young Leaders

Select a mailing list > Update > See new option - Constant Contact List ID

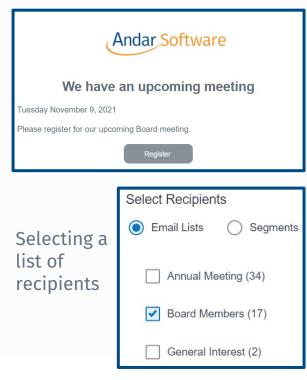
Choose the corresponding Constant Contact list ID such as Board Members in this example



Andar/360 & Constant Contact

Step 3: Create your email campaign

Create an email campaign in constant contact



Click send and see the details in Andar/360

Young Leaders	Mailing Lis														
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Create Date/Time	Source Code	Status	Date used	Comments		Postal	Email	Phone	#Names	Sent	Read	≠Gift.	Total Pledge	Avg.Gift	\$
	1876	Used	11/09/2021	Young Leaders November Even		1	1		3	3	0	0	\$0.00	\$0.00	
11/09/2021 12:01 AM		Used	11/09/2021	Young Leaders November Meet	ing - Registration Email	~	~		2	2	0	0	\$0.00	\$0.00	
11/08/2021 11:10 PM	1873	Used	11/08/2021	December Board Meeting - Reg	istration Email	~	~		2	2	1	0	\$0.00	\$0.00	
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					Count % of Total				% of Sent			76 OF K6	be		0
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Maiville, Robin					2 0 2	100%	e.		% of Sent			16 0F K6			0
Maiville, Robin				Ready	2				% of Sent	-		19 0F KB			0
Maiville, Robin				Ready Sent Read Error	2 0 2 1 0	100% 50% 0%			% of Sent	- - 50% 0%		76 OF K65	-		0
Maiville, Robin				Ready Sent Read	2 0 2 1	100% 50%			% of Sent	- - 50%		76 07 145	-		0



Andar/360 & Constant Contact

Step 4: Check out your analytics

Analytics in Constant Contact

Items	Export All Compare Select	ed			Q Sea	arch by Campai	gn Name
	Time Sent \downarrow	Campaign Name	Sends	Opens	Clicks	Bounces	Unsubscribes
	Mon, Nov 8, 2021, 11:18 PM	Young Leaders November Event eMail	3	0 0%	0 0%	0 0%	0 0%
	Mon, Nov 8, 2021, 11:03 PM	Young Leaders November Meeting - Registration Email	2	0 0%	0 0%	0 0%	0 0%
	Mon, Nov 8, 2021, 10:45 PM	November Board Meeting - Registration Email 2	3	1 33%	1 100%	0 0%	0 0%
	Mon, Nov 8, 2021, 10:29 PM	December Board Meeting - Registration Email	1	1	0	0	0

Analytics in Andar/360

Mailing List Mo	nitor	Young Leaders (18	73)	SEVA()	• • • • •
Status: Used Date	used:	11/08/2021			
		eting - Registration Email			
# of Names: 2 Cost		\$0.00			
# Responses: 0 Tota	-				
Cost/Pledge: \$0.00 Resp					
# of Gifts: 0 Ave	rage Gift:	\$0.00			
1					
	Count	% of Total	% of Sent	% of Read	C
Total	2	82	-		
Ready	0		-	-	
Sent	2	100%		1.00	
Read	1	50%	50%	(12)	
Error	0	0%	0%	-	
Invalid	0	0%	0%	100	
All Clicks	0	0%	0%	0%	
Unique Clicks	0	0%	0%	0%	
Subscribed on Web	0	0%	0%	0%	
Unsubscribed on Web	0	0%	0%	0%	



Andar/360 & Constant Contact

See everything on your Marketing Dashboard

See your activity on your marketing dashboard

and the second	Plans × OconstantCor	ntact × 🛛 🚱 Executiv	e Plus × 🛛 🚱 Goals ×	RD Direct	tor ×	Q Re	ports ×	Account	Exec ×	Grant	Tracking ×	
	CEO Dashboard ×	Prospects ×	Churn × G Finance	×	QV	olunteer ×		🚱 Rank & Se	gments ×	Q	Thank Yo	u's >
Andar	Constant Co	ntact Sync	Manager						Refres	نمي hed: 12:22 AM	'■⊖≎	•:
cent @ CRM × +	Young Leaders Mailing	List								8*^	<>++++++++++++++++++++++++++++++++++++	•
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Andar/360 Main Menu	11/09/2021 12:14 AM 1876	Used 11/09/2021	Young Leaders November Event eMail		~		3	3 0	0	\$0.00	\$0.00	
Account Search	11/09/2021 12:01 AM 1874	Used 11/09/2021	Young Leaders November Meeting - Regis	stration Email	~		2	2 0	0	\$0.00	\$0.00	
Award	11/08/2021 11:10 PM 1873	Used 11/08/2021	December Board Meeting - Registration E	mai			2	2 1	0	\$0.00	\$0.00	
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Let's see the Andar/360 & Constant Contact Integration in action



Summary

With the new Andar/360 and Constant Contact integration you can:

- Easily synchronize the two systems
- Update information in either system and see it automatically reflected in the other
- Access important donor data and analytics stored in your system of record – Andar/360





Pricing and Pre-Sale Option

Let's see the Andar/360 & Constant Contact Integration in action





	Pre-sale (until December 9)	Starting December 10
Metro 1	\$4000 Includes half-day of training	\$4500 Includes half-day of training
Smaller Organizations	\$2000 Includes half-day of training	\$2500 Includes half-day of training

Andar Software Sales Team Contact

Eric Crammond	Mallory Denomy	Robin Maiville
Director of Business Development	Sales Manager	Andar Software Sales
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877-479-3780 x319	877-479-3780 x331	269-372-2753 (Andar Softwar

Price is listed as a one-time license

Module released

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January 2022

fee







Thanks for joining!

