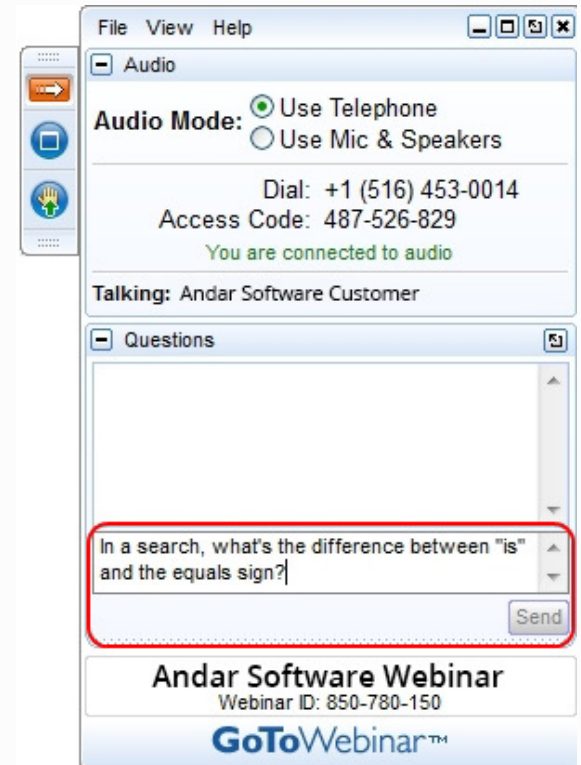


# Andar/360 & Constant Contact

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



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:

1.

## Marketing strategy

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

2.

## Collaboration

Breaking down silos and fostering collaboration where email marketing supports donor relationship building

3.

## Donor interests

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





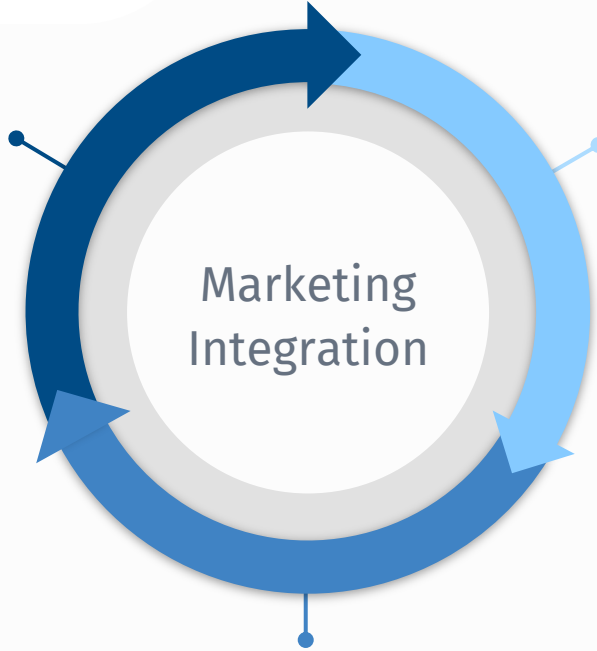
# Andar/360 & Constant Contact

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

# Andar/360 & Constant Contact Overview

Marketing Integration Overview → The Why Behind the Integration → Constant Contact Overview → Live Demo → Q&A

Capitalize on marketing analytics

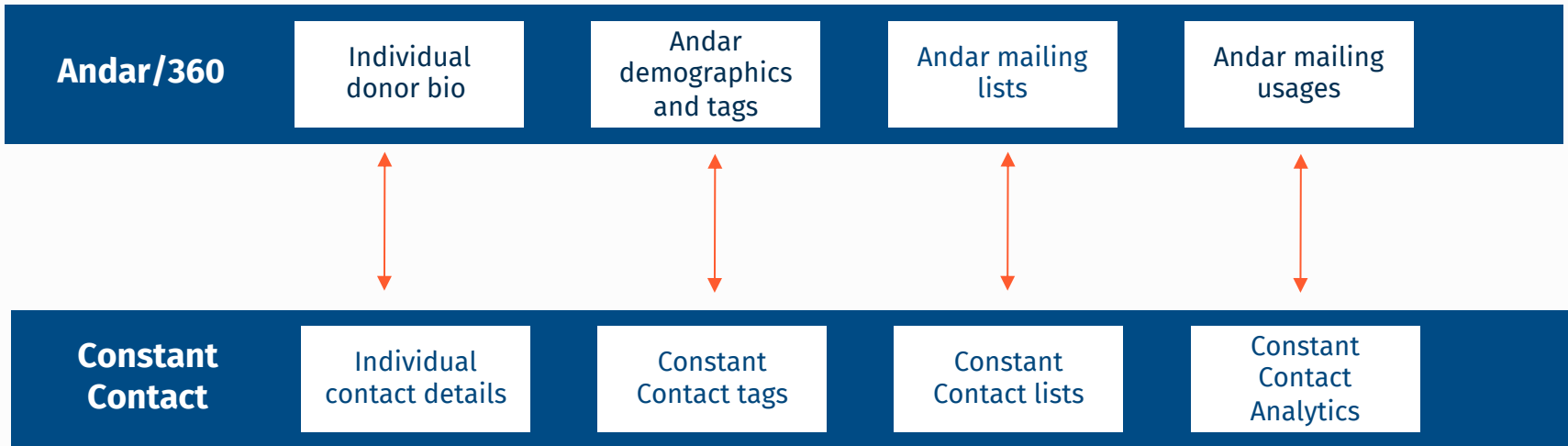


Develop mailing lists

Send email campaigns

# Constant Contact Overview

## Aligning Andar/360 and Constant Contact:



# Andar/360 and Constant Contact

## Step 1: System Preferences

The screenshot shows the 'Preferences' window with the 'Email Marketing Integration' section selected in the left-hand navigation pane. The main content area is titled 'Email Marketing Integration' and contains two sub-sections: 'Mailchimp Integration' and 'Constant Contact Integration'.

**Mailchimp Integration:**

- Enable Mailchimp Integration
- Mailchimp API Key: [Text Field]
- Mailchimp Host Prefix: [Text Field]
- New Accounts Warehouse: [Dropdown]
- Email Preferred Type: [Dropdown: Work Email]
- Address Preferred Type: [Dropdown: Street Address]
- Check for activity and tag updates every [60] minutes
- New accounts on mailing lists are added with a [subscribed] status
- Note: Only applies where the new account was not added via a subscription

**Constant Contact Integration:**

- Enable Constant Contact Integration
- Constant Contact API Key: [Text Field: a6009d97-8764-42ae-86eb-5fa55ee1eb6c]
- Constant Contact Secret Key: [Text Field: Masked]
- [Authorize] [Test Connection]
- Check for updates in Constant Contact every [2] minutes
- New Accounts Warehouse: [Dropdown: ConstantContact] [Text Field: Constant Contact New Accounts]
- Email Preferred Type: [Dropdown: Personal Email]
- Home Address Preferred Type: [Dropdown: Street Address]
- Work Address Preferred Type: [Dropdown: Individual Work Address]
- Other Address Preferred Type: [Dropdown: Seasonal Address]
- Segment Mailing List: [Dropdown: CC General Segmentat] [Text Field: Constant Contact General Segmentation List]

Buttons at the bottom: Report, Authority, Apply, Update, Cancel.

System > Preferences > Email marketing integration

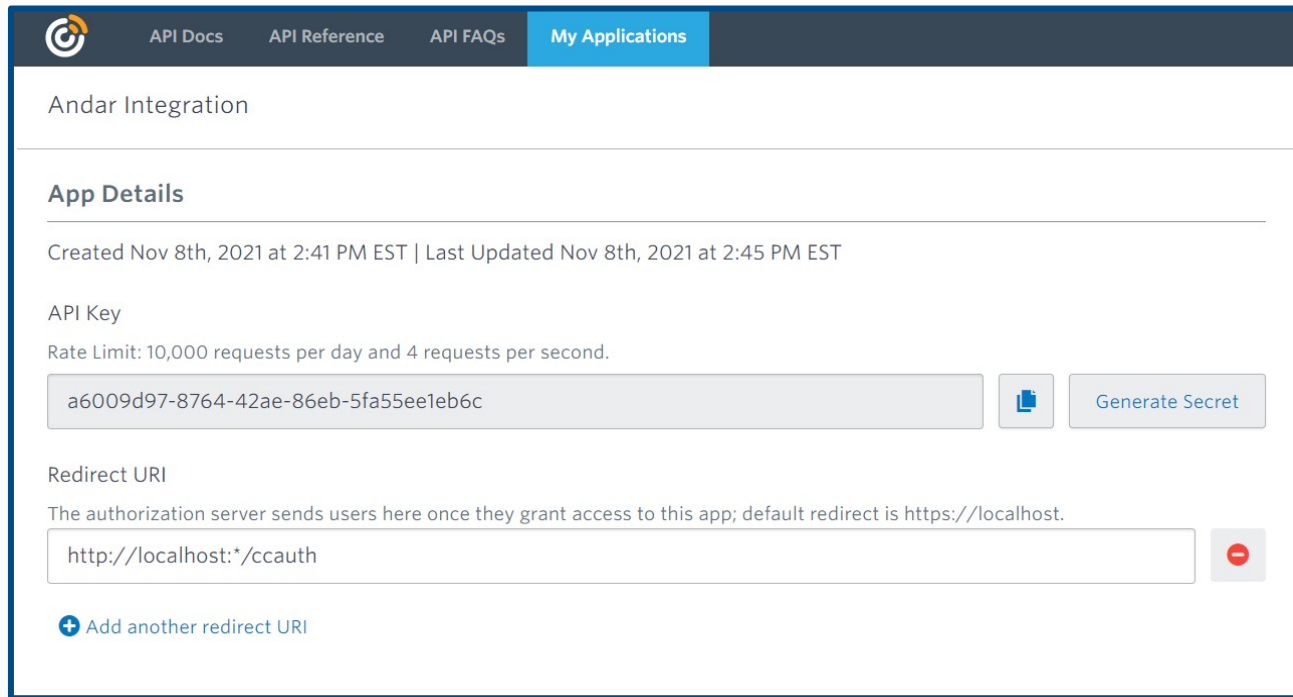
Select “Enable Constant Contact Integration”

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



The screenshot shows the 'My Applications' page in the Andar/360 interface. The page title is 'Andar Integration'. Under the 'App Details' section, it shows the creation and last update dates: 'Created Nov 8th, 2021 at 2:41 PM EST | Last Updated Nov 8th, 2021 at 2:45 PM EST'. The 'API Key' section displays the key 'a6009d97-8764-42ae-86eb-5fa55ee1eb6c' with a copy icon and a 'Generate Secret' button. The 'Redirect URI' section shows the URI 'http://localhost:\*/ccauth' with a remove icon and a '+ Add another redirect URI' button.

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

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	DiPaola, 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

Board Members ★			
Created: Nov 8, 2021			
17 Contacts All Contacts ▾			
<input type="checkbox"/>	Email Address ↑	First Name	Last Name
<input type="checkbox"/>	ajames@demo.andar360.com	Alfred	James
<input type="checkbox"/>	bbreckles@demo.andar360.com	Bob	Breckles
<input type="checkbox"/>	bcarr@demo.andar360.com	Bruce	Carr
<input type="checkbox"/>	cdipaola@demo.andar360.com	Carmen	Di Paola
<input type="checkbox"/>	clangevin@demo.andar360.com	Cheryl	Langevin
<input type="checkbox"/>	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
Constant Contact List ID	<input type="text"/>

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

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

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

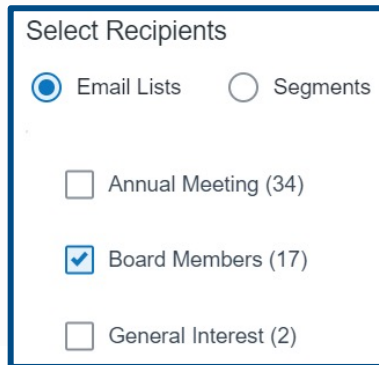
# Andar/360 & Constant Contact

## Step 3: Create your email campaign

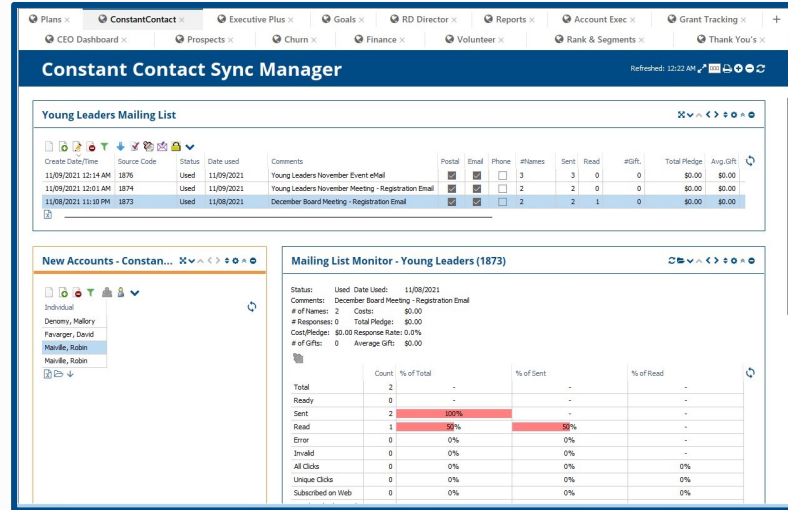
Create an email campaign in constant contact



Selecting a list of recipients



Click send and see the details in Andar/360





# Andar/360 & Constant Contact

## Step 4: Check out your analytics

### Analytics in Constant Contact

Campaigns Sent from Nov 8, 2020 - Nov 8, 2021

See how all your campaigns performed during the selected time range.

4 Items [Export All](#) [Compare Selected](#)

<input type="checkbox"/>	Time Sent ↓	Campaign Name	Sends	Opens	Clicks	Bounces	Unsubscribes
<input type="checkbox"/>	Mon, Nov 8, 2021, 11:18 PM	Young Leaders November Event eMail	3	0 0%	0 0%	0 0%	0 0%
<input type="checkbox"/>	Mon, Nov 8, 2021, 11:03 PM	Young Leaders November Meeting - Registration Email	2	0 0%	0 0%	0 0%	0 0%
<input type="checkbox"/>	Mon, Nov 8, 2021, 10:45 PM	November Board Meeting - Registration Email 2	3	1 33%	1 100%	0 0%	0 0%
<input type="checkbox"/>	Mon, Nov 8, 2021, 10:29 PM	December Board Meeting - Registration Email	1	1 100%	0 0%	0 0%	0 0%

Show 50 Page 1 of 1

### Analytics in Andar/360

Mailing List Monitor - Young Leaders (1873)

Status: Used Date Used: 11/08/2021  
Comments: December Board Meeting - Registration Email  
# of Names: 2 Costs: \$0.00  
# Responses: 0 Total Pledge: \$0.00  
Cost/Pledge: \$0.00 Response Rate: 0.0%  
# of Gifts: 0 Average Gift: \$0.00

	Count	% of Total	% of Sent	% of Read
Total	2	-	-	-
Ready	0	-	-	-
Sent	2	100%	-	-
Read	1	50%	50%	-
Error	0	0%	0%	-
Invalid	0	0%	0%	-
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

The screenshot displays the Andar/360 Marketing Dashboard interface. The top navigation bar includes tabs for Plans, Constant Contact, Executive Plus, Goals, RD Director, Reports, Account Exec, and Grant Tracking. Below this is a sub-navigation bar with tabs for CEO Dashboard, Prospects, Churn, Finance, Volunteer, Rank & Segments, and Thank You's. The main content area is titled "Constant Contact Sync Manager" and shows a "Young Leaders Mailing List" table with columns for Create Date/Time, Source Code, Status, Date used, Comments, Postal, Email, Phone, #Names, Sent, Read, #Gifts, Total Pledge, and Avg. Gift. Below the table are three panels: "New Accounts - Constan...", "Mailing List Monitor - Young Leaders (1873)", and a "Mailing List Monitor" table. The "Mailing List Monitor" table shows a breakdown of the mailing list's performance, including counts and percentages for Total, Ready, Sent, Read, Error, Invalid, All Clicks, Unique Clicks, and Subscribed on Web.

Create Date/Time	Source Code	Status	Date used	Comments	Postal	Email	Phone	#Names	Sent	Read	#Gifts	Total Pledge	Avg. Gift
11/09/2021 12:14 AM	1876	Used	11/09/2021	Young Leaders November Event eMail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	3	0	0	\$0.00	\$0.00
11/09/2021 12:01 AM	1874	Used	11/09/2021	Young Leaders November Meeting - Registration Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	2	0	0	\$0.00	\$0.00
11/08/2021 11:10 PM	1873	Used	11/08/2021	December Board Meeting - Registration Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	2	1	0	\$0.00	\$0.00

	Count	% of Total	% of Sent	% of Read
Total	2	-	-	-
Ready	0	-	-	-
Sent	2	100%	-	-
Read	1	50%	50%	-
Error	0	0%	0%	-
Invalid	0	0%	0%	-
All Clicks	0	0%	0%	0%
Unique Clicks	0	0%	0%	0%
Subscribed on Web	0	0%	0%	0%



# Demo

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

# Pricing

	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

Price is listed as a one-time license fee

Module released January 2022

## Andar Software Sales Team Contact

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# Q&A



# Thanks for joining!