

Summary of the Convio Open Development Program Process

This is a high level process outline to guide expectations of prospects who express interest to become an integrated open partner with Convio. This process may change over time and not all steps are included here.



About Convio Open. Convio welcomes integration partners who embrace and extend our Open platform. By fostering a vibrant and valuable ecosystem of partners through the Open Development Program, Convio provides the most flexible and extensible platform for nonprofits to develop solutions that meet the objectives of their missions. Please visit http://open.convio.com for more details.



Discovery call. Let's chat! See if there is mutual benefit and interest in pursuing a partnership.



Sign an NDA. If both parties want to move forward, a mutual NDA allows both parties to have deeper discussions on product integration ideas and roadmaps.



Collaborate on integration scenarios. Brainstorm to think of some common and high-value use cases that would be of interest to our common clients. These integration scenarios will guide the subsequent development work for demonstrating a working integration later.



Complete an integration specification form. This is a technical yet descriptive document explaining what the integration is, what Convio product it will integrate with, what API method calls are used on both the Convio side and with your product application or platform, and sample use cases of how the integration can be used by clients. This form is required to be submitted for review by Convio before a formal agreement is signed.



Signed Open Partner Program agreement. This is the legal document that establishes a formal relationship between our two companies and allows your organization to be officially recognized as an Open partner. It spells out terms and conditions of the program, criteria for approval, benefits, and fees.



Set up a technology/integration demonstration. When your integration development work is completed and tested, a Convio evaluation team will want to see a working prototype of your integration. A working production version in use by a common client is an acceptable review environment provided you obtain the client's permission beforehand. The demonstration portion of the review process ensures the submitted integration meets the description of functionality documented in the integration specification form, follows best practices, and that there is demonstrated value that will benefit our clients. Convio will provide you guidelines on sample integration proof points as well as provide tips on how to improve your integration and answer any other questions you may have during the integration development period. Convio will inform you after the review if all the evaluation requirements are met to move forward or not.

Please note that this step is NOT optional; Convio will not approve a submitted integration application if there is not a live functioning integration available that can demonstrate value for mutually-agreed business use cases. Convio also wants to ensure that our clients do not adopt integrations that may potentially introduce security or performance issues. This critical step in the process protects our clients by ensuring that our two technology solutions are compatible with each other and that the proposed integration will not cause any unintended side effects.



Submit staff contact names. All partners are entered in to our CRM system to track on-going correspondence and allow you to be recognized by Convio Support should you need technical assistance. Please provide Convio a list of staff members that will possibly be working with Convio including but not limited to: sales, marketing, business development, product development, contracts, support. Each contact should have their name, title, phone, and email provided. Of these staff members, you can designate up to two individuals who will be granted access to create support cases on behalf of your organization.



Provide marketing and sales collateral. Please provide Convio with relevant sales and marketing tools that will be used by the internal Convio staff, including sales and services members, so they can be educated on what your company is/does, the nature of the integration to the Convio open platform, value of the integration, and guidelines for identifying potential joint opportunities for us to co-bid. Examples of material include:

- Sales slides in Powerpoint format
- Product/platform description or spec sheets (PDF, Word, etc.)
- FAQs about your product and/or the integration to Convio
- Educational material to assist with sales opportunities- identify leads, competitive info, etc.
- Bundled pricing / packaging to offer Convio clients
- Case studies or client references

Note that without a proper set of marketing and sales collateral, it will be difficult to promote your product/integration by Convio client-facing staff members. Also it is required by new Open partners to work with Convio to produce Convio-specific pricing packages that are aligned with our licensing model and target markets if you are an ISV.



Website listing. Convio will provide you with a form to complete that will list your company on the partner section of our website. You will also have access to use Convio authorized partner

"badges" on your website and in your marketing collateral for each approved application that is approved. Please attach a logo image of sufficient quality to be published on a web page that will accompany your company description – we ask that the width of the logo not exceed 140 pixels and be legible.



Access to Convio Community and Support. As a partner you will be granted access to the Convio on-line community reserved for clients and partners; it includes focused forum discussions for partners and technology platform topics, as well as on-line training modules and sales kits available. Convio open partners can also log cases directly with Convio support for troubleshooting any integration issues that may arise.



Joint opportunities. Working with the Convio marketing team provides many opportunities for Convio partners to get more exposure, including but not limited to: Convio website listing; Convio user conference sponsorship and exhibitor booths; joint webinars; guest contributions to Convio's electronic newsletter and blog; press releases. For joint sales opportunities, Convio will work with partners to co-bid on proposal requests that have requirements specified which are best met by your product technology or integration offering.



Partner communications. In addition to the partner forum that exists within the Convio Community, Convio provides quarterly communications to partners including email and phone conferences. Upcoming product releases and other partner relevant topics will be discussed.