TECHNOLOGY ROADMAP 2017

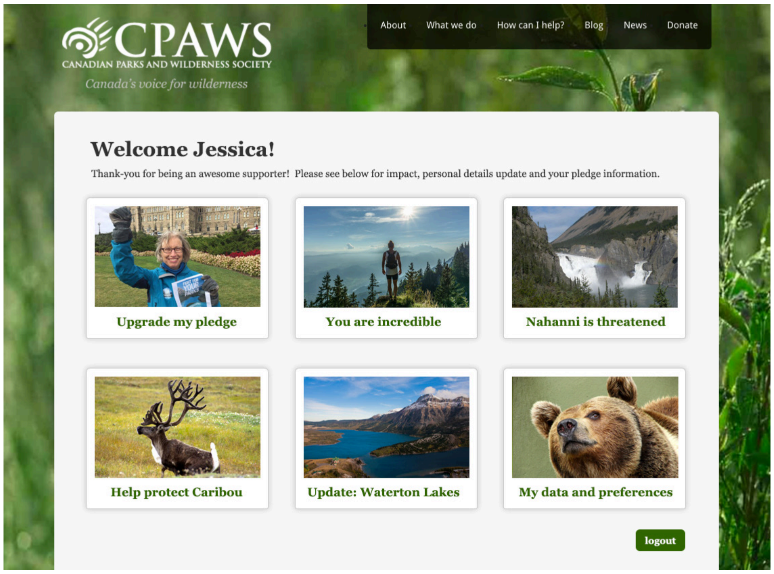
engaging NETWORKS

MAJOR MODULES

Supporter Hub

The genesis of the 'Hub', as we call it, was the practical need to create a website where supporters could self-manage things like recurring donations and their contact information. As we started to plan this new technology it is was clear that the Hub could serve as a much broader space to engage supporters. Once a supporter is logged into the Hub, they will have access to gadgets, each providing access to unique content and functions:

- a summary display of a supporter's involvement (donations, advocacy, events, and so on)
- a summary of the outcomes of advocacy campaigns that supporters have joined or programs they have help to fund
- functions to upgrade recurring donations, download tax receipts, change a credit card used for processing donations, and update the constituent record, etc.
- a gamified score to encourage supporters to reach higher levels of engagement
- suggested next actions tailored to the personal profile of each supporter



The content will auto-populate based on the profile of each supporter. We have also come up with a sophisticated design that works with mobile devices and avoids complicated navigation for the supporter. Each function will be presented as a gadget on the homepage allowing for custom design focusing on the use of images to draw supporters in.

Clients determine what functions are included in the hub, and clients will control the HTML template. The static content within each gadget (as opposed to the auto-populated content) will be added in the account dashboard leveraging the user-friendly page-builder technology we released in 2016. We are very excited for the potential of this new technology to really engage supporters and increase retention.

Direct Mail Module

Our software is already used by clients to build segmented lists for direct mail and for reconciling payments via the dashboard import tools. The gap in the current process is that transactions are not specifically marked as 'direct mail' so clients need to create a campaign as a donation page in order to import, reconcile, and report the data.

Therefore this year we are building a custom module for direct mail. The outcome will be a new transaction type within the software, to ensure that powerful segmentation capabilities are incorporated into our clients' dashboard reporting, as well as into their downloadable data reports, and in their audience profiling for email communications.

Finally, in 2016 we implemented an upgrade to the process for importing transaction data, creating a simple process to import a file, read the import fields, match fields based on the transaction type (e.g. credit card donations, recurring gifts, check and cash transactions, etc.), and store import formats. This technology will be adapted to accommodate the new direct mail transactions.

Master Dashboard

Many of our international clients have more than one country-level account under umbrella administrator access. At the moment, there is no centralized dashboard that aggregates reporting across all of the linked accounts, and there isn't a function for account users in one country to share content with account users in another country (e.g. share a page template.) We will be building a "Master Dashboard" to make these kinds of functions possible.

Imagine rolling up the data on the total number of petition signers for a global campaign even if the campaign is created and managed in separate country accounts. Imagine being able to create a page template in one account, and then allow the account users in other countries to seamlessly build a page using the same template. We expect all of our international clients with multiple accounts to benefit from greater efficiency and more powerful data.

Social Profiling & Engagement

Our clients need tools to better understand how supporters are connected on social channels, and they also need better tools to engage with supporters on social channels. This year, Engaging Networks will be working to deliver a new module for social profiling and engagement.

Social profiling involves collecting public information about the social channels being used by supporters and related information. Using supporter email addresses, we will start collecting basic information like social handles, influence, and whatever other demographic data is being shared publicly. This information will be extremely useful in adding further sophistication to segmentation for our email marketing, marketing automation, and dynamic page content. The information will also be accessible via the 'manage supporter' page so that account users can search, access and view the data.

Profile information is central to delivering great tools for social engagement, but the other piece is social listening so that clients are able to message supporters via Twitter or automate Facebook ads to the right audiences at the right time. Combining information about what supporters are posting on social channels with tools to push messaging will create a powerful new technology for our clients.

ENHANCEMENTS AND NEW FEATURES

Single Reporting Currency

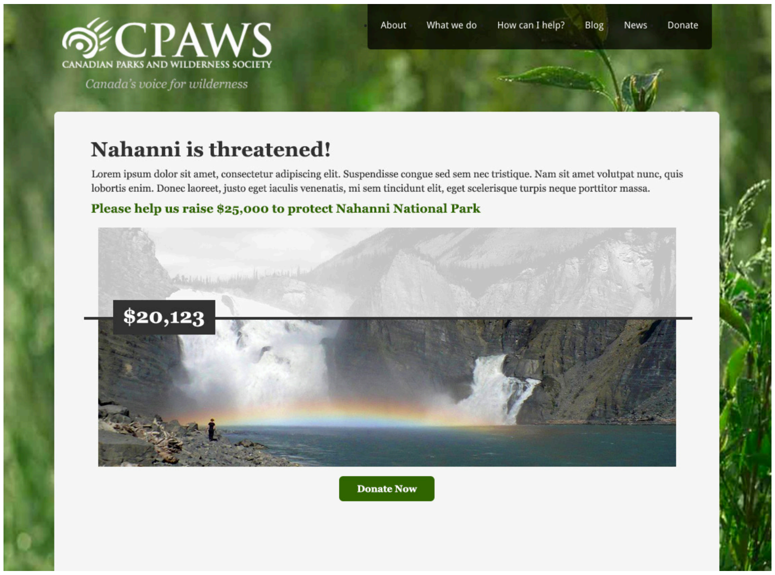
All fundraising transactions that we process are automatically converted into five default reporting currencies (USD, GBP, CAD, EUR, and AUS.) In other words, a transaction processed in Japanese Yen is recorded as Japanese Yen, but it is also converted and stored in the five default reporting currencies. When exporting transaction data from the software (download files) we include the amount in the transaction currency and we include the converted amount in the five default reporting currencies.

Several clients have told us that in addition to having the multiple currencies in export files, they also want fundraising data rolled up into one of the default reporting currencies and used in the visual and data reports. It's on the way in the first half of 2017.

Extensions to page-builder

For the first release of the year on February 3rd, our revolutionary page-builder technology received nice upgrades, moving over some of the advanced functionality from our legacy tools:

- logic filters for auto-responder emails
- ENS API services for processing pages and transactions
- form dependencies that automatically re-configure fields based on user inputs
- enhancements to ‘quick reports’



Then in the release in late March, we are delivering more features for page-builder, including:

- display widgets that you can drag and drop into any page (e.g. progress bars)
- a new page type for eCards
- storing PDF files of advocacy messages in our content distribution network for supporters to access via a link in the auto-responder email, and clients to access via dashboard download
- the addition of a new content block type for JavaScript isolating this content from regular text blocks

Throughout 2017 we will continue to deliver more enhancements, and new page types, to the page-builder module:

- a new page type for Twitter advocacy campaigns (currently clients achieve this by adding JavaScript to the regular email advocacy page so the new page type will be a major upgrade)
- a new page type for our existing membership module (re-built from the legacy technology with new features added and extending membership into the ‘manage supporter’ pages and the query tools)
- a new page type for surveys (currently this is done in the legacy tools by adding questions to a data capture form; the upgrade is a brand new page transaction type with custom reporting tools)
- a new page type for click-to-call advocacy campaigns that will incorporate third party technology for auto-dialing (clients are executing these campaigns now using a modified version of an email advocacy page, so the addition of a custom page type will make the process much easier)

Bulk Email Templates

Our current template function in the bulk email tool is being overhauled this year. The main objectives of the changes are:

- to update the template dashboard UI and the work flow
- to create a range of default templates for fundraising alerts, advocacy alerts, and newsletters

The UI changes are being inspired by the success we have achieved in the new page-builder technology. When you are ‘on page’ in page-builder it’s possible to drag and drop blocks into the page template and have them automatically pop up for editing and styling (subject the overall page styles.) We are building a similar UI for HTML email templates, moving away from the ‘div areas’ that appear within the text area for editing. The new template framework will add all of the features you are now used to using in page-builder, making the creation of emails from templates much easier for non-technical users. One additional change is the addition of a simple image editor tool similar to the ones you are used to seeing in interfaces like Facebook.

We are also going to build out a small library of default templates for clients to use. Until now, clients have imported their own HTML from custom templates created outside Engaging Networks. The new libraries will allow organizations without custom templates to brand emails using ours.

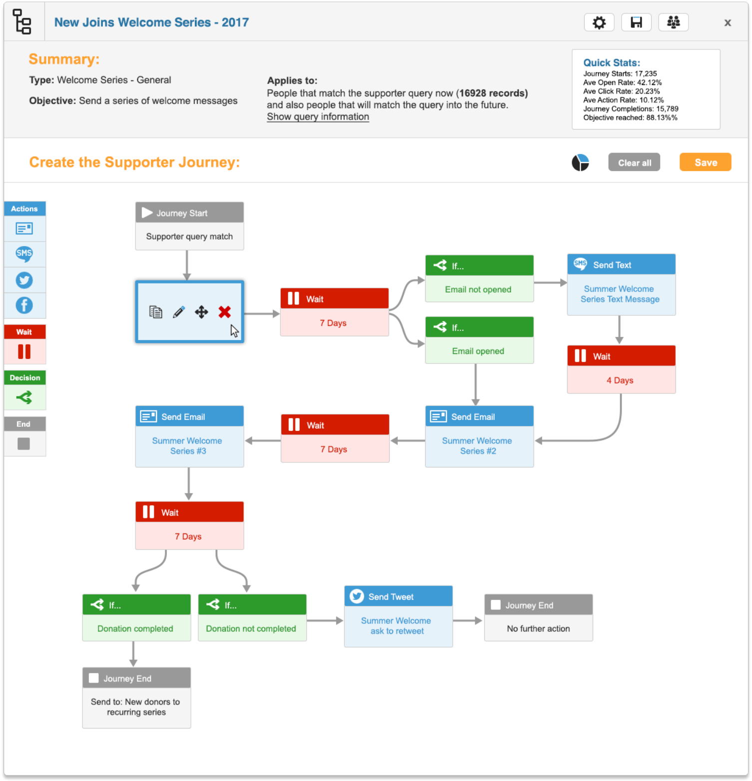
Bulk Email Previews

The Engaging Networks platform currently displays a rendering of how an email message will appear when viewed in a limited number of devices. We plan to expand this preview function to pull your email HTML into a third party rendering software (e.g. Email on Acid or Litmus.) This new feature will leverage APIs provided by the third party so that you don't have to leave the Engaging Networks dashboard. Using a third party we can generate a wider range of previews across devices, email clients, and apps.

Marketing Automation – Phase II

In a release being planned for late March of this year, we are going to release a number of updates to the marketing automation tools developed in 2016. These updates include:

- split test email messages at each decision point in a workflow
- applying a timeframe to review the reporting stats
- creating a new data type so that workflow data can be exported via the software API
- adding a download function for each workflow to extract a file of the constituent data and activity of each person with an active record
- adding more workflow templates, including a custom template that leverages our powerful 'profiles' technology



There are also larger development projects planned in 2017 for marketing automation that involve adding more communication channels to a workflow. In addition to email communication, we are building the ability to send text messages at decision-points in any workflow, and communication via social media. The integration of the social media communication channels is only possible once we have introduced social profiling of your constituent records (for example, identifying a supporter's Twitter handle.) Collecting this data will allow us to build other tools for social engagement beyond marketing automation.

Hide Opt-in Email Landing Page

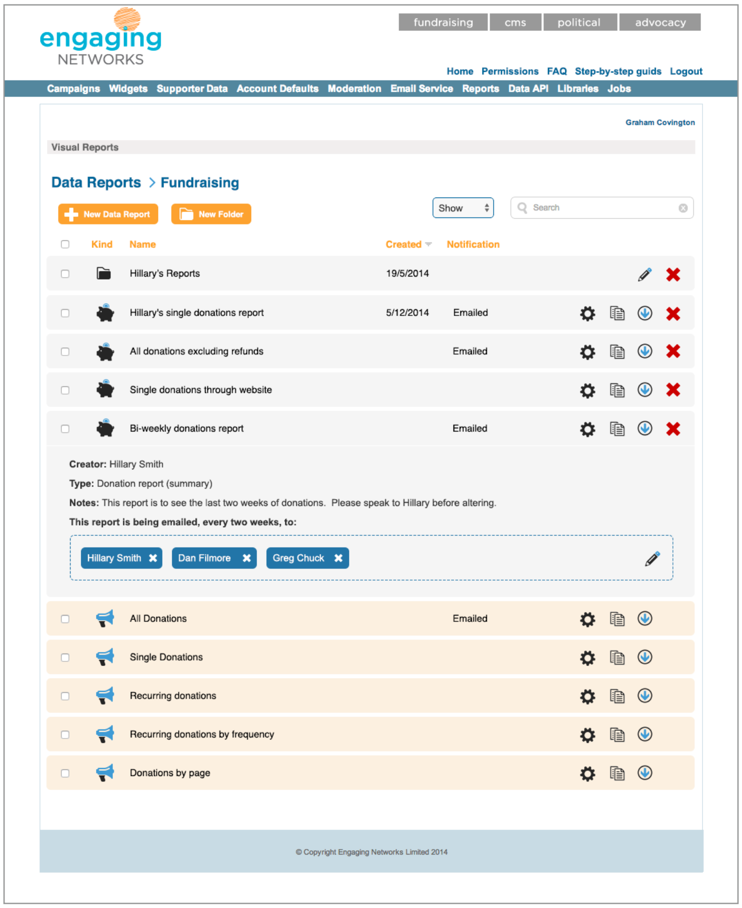
The software currently gives clients the option of ignoring an opt-in question response if the supporter lands on a page from an email (it's an account setting in the dashboard.) The supporter is already subscribed to the email marketing list (otherwise they wouldn't be getting an email) and should use the unsubscribe option provided in the email to unsubscribe or manage preferences.

A number of clients would prefer to hide the opt-in question altogether on any email landing page to avoid potential for confusion for the supporter. It's on the way.

Reporting

Clients currently report data from the software by adding filters to create a custom view of graphs displayed in the dashboard. These visual reports are available for each major module in the platform. In addition there is a separate function for creating custom queries of constituent and transaction data available as download files (export files.) We also have a separate tab for specific financial reports (e.g. give me all successful single donations this month, or for a specific data range, applying custom filters.)

Apart from tools to build export files of constituent and transaction data, we are undertaking a major overhaul of the reporting available in the dashboard. This includes changes to the dashboard user interface and to the reports that we make available.



Most importantly, we are adding download files of aggregate summary data. For example, you may want to have a single excel spreadsheet that includes a row of data for each email campaign sent during a selected time period (or a specific list of email campaigns). The columns for each row (each email campaign) will include overall stats for the email performance, and extensive information about the page conversions associated with the campaign. We will also add a row of summary data providing aggregate numbers for all email campaigns included in the report. This report will give clients an excellent set of metrics to measure the effectiveness of their email marketing program. We have quite a few of these reports to create in this format, and we will also be asking clients to suggest the reports that they would find most useful.

As part of the UI changes we are adding services to have data reports automatically emailed, and we are adding the ability for individual account users to create and manage custom reports that they build off our templates.

All of the current visual reports will still be available for all modules, but some of these will be upgraded to include more filter options.

Page Split Tests

Many of our clients are increasing investment in advertising on social media channels. An important part of any effective digital advertising campaign is continuous monitoring of the data on clicks and conversions. This new feature will automate the testing of landing page conversion.

Clients will create several variations of a landing page they would like to test using our page builder technology. Once the pages are created, the software will generate a single URL for the test group and then automatically direct the traffic in a 'round robin' to each of the landing pages. A metric can be set to decide how many page views or conversions are required before directing 100% of the traffic to the winning page (the page that converted best.)

While this feature will be extremely useful for advertising landing pages, it can be used to optimize testing of landing pages from email campaigns, and even conversions from links coming from search or from the client's own website.

Other Notables

Every year we deliver a lot of smaller technology changes that are not outlined in the Technology Roadmap. These smaller projects get tucked into releases every 4-6 weeks. These are a few notable ones that we have in the works.

While it is already possible to display an **asking string** on a donation page that changes based on profile of the donor visiting the page, we have an upgrade in store for 2017 that will allow for even more sophisticated manipulation of the suggested donation amount and the other display values.

Our Permission Group technology is used to create filtered views of the dashboard, account content, and data records for people working in **local groups of chapters**. This year we are adding a few enhancements to automate the allocation of pages and data records to Permission Groups.

Clients have been asking us to introduce a feature called **'origin source'**. The idea is to create and store an unchangeable value for every constituent record that will identify how a record came into the database. In addition to a client-generated value as 'origin source' we are also going to store various other information like the first transaction type (if the record has not been imported), the attributes for the campaign, etc.

Our software does not currently have a simple way of associating individual data records into a 'household'. We have already implemented some back-end changes in late 2016 to re-structure the way that constituent data is imported to account for **'household' records**. This is now going to be brought into the front-end functionality requiring changes to the 'manage supporters' screen, the import constituent data screen, and even the way in which page forms are constructed and their associated processing logic (e.g. if someone with an email address wants to register three children for an event, you need the ability to add constituent records without necessarily having a email address for each record. We will also be creating tools to store relationships within the household, and options for managing households.

There is also a need to create **organizational records** distinct from individual records. This process involves some significant work on both the back-end record search functionality, the record management process in 'manage supporters', and of course changes to the database structure. We are effectively creating a new record type and ensuring that forms can process organizational records seamlessly.