C-Insight

Innovative Association Management Software

Developed by:

C-Insight Product Guide

Contents:

Section 1: Introduction

C-Insight by Blue Tahiti Software is a modern, powerful association management platform which can be accessed via user-friendly interfaces from any location on any device. Users benefit from utilizing well established functionality which has been carefully configured to their unique data hierarchy, rules and processes.

The main driving factors in the design and development of the C-Insight platform have been to make data input simple, to improve access to information and to automate and streamline processes for all users, whether internal association staff and management or members, donors and other constituents.

Blue Tahiti's considerable data management expertise ensures information is kept clean and up-to-date. As all system modules are developed solely by Blue Tahiti, real-time integration, across departments, and with the association website, is built in. This means that user organisations enjoy the significant benefits of a true 360° view of constituent contact details, demographics, activity, transactions and engagement.

C-Insight frees up time for association staff and management to focus on service and development activity, and provides a modern, convenient environment for constituents to engage with the organisation and each other. The solid foundation of accurate, comprehensive and up-to-date information enhances the experience for staff and constituents and supports efficient, knowledge-based strategic planning and development.

Company Background:

When Philippe Werey and Steve Nicholls founded Blue Tahiti Software in 2003 they wanted to combine their considerable experience of database marketing application development, to provide information management solutions that were more accessible and affordable to more organisations. The past 12 years have seen users of Blue Tahiti database tools grow to more than 25,000, across 22 user organisations spanning Europe and North America. Our Association/Non-Profit customers range in size from 3 to 2000 staff users, with 2000 to 100,000 records, all of which enjoy solutions that are developed and customised to meet their specific needs.

Section 2: Technology Architecture

Platform Technology:

Blue Tahiti Software is a Microsoft partner. C-Insight is developed using MS SQL Server and .NET. The platform utilizes Bootstrap to ensure that it is device friendly. Website integration is achieved primarily using iframes. The platform has capacity to integrate with 3rd party software, existing examples include MailChimp, QuickBooks, Salesforce and others.

Software as a Service (SaaS):

Blue Tahiti SaaS applications are available from any computer or any device via a web browser. Because most people are familiar with using the Internet to find what they need, our apps tend to have high adoption rates, with a lower learning curve.

Having us manage the IT infrastructure means the customer has zero IT costs for hosting hardware and software. The Blue Tahiti SaaS model can also support organisations with low internal IT expertise and resources.

Data Security and Storage:

Security is more than just user privileges and password policies. It encompasses policies and procedures to guarantee the highest possible levels of:

- Physical security
- Network security
- Application security
- Internal systems security
- Operating systems security
- Third-party certification

Blue Tahiti SaaS applications are hosted on high specification fully redundant hardware. All servers are built and supplied by Tier 1 manufacturers (Dell). Servers are covered by 24x7, 4 hour response warranties. As a matter of course, all customer data is backed up to network attached storage (NAS) on a daily basis. Off-site backups can be taken weekly if desired.

If your organisation requires the reassurance that, in the event of Blue Tahiti being unable to deliver or maintain the application, for whatever reason, we can offer the option of an escrow agreement. An escrow agent is a third party who stores a copy of the Blue Tahiti SaaS software source code. The escrow agent will release a copy of the source code to the customer if any of the events set out in the escrow agreement occur.

Upgrades and Scalability:

Because Blue Tahiti manages all updates and upgrades, there are no patches for customers to download or install. Blue Tahiti also manages availability, so there's no need for customers to add hardware, software, or bandwidth as the user base grows.

Blue Tahiti SaaS applications can scale easily as the user volume increases and as the amount of data addressed by the application also rises. Performance can be relied upon so that the user experience never degrades.

Upgrades are usually driven by client needs, with updates provided as needed each quarter. Major upgrades are not imposed on clients and all versions continue to be supported. The C-Insight platform consists of a database-driven architecture. This flexibility means that when upgrades are implemented, existing customizations remain in place.

Section 3: Product Migration

Initial Consultation:

Blue Tahiti provides a free initial consultation. This enables us to form a good understanding of your operational requirements, from which we can clarify options, regarding system configuration and integrations, and make appropriate recommendations.

Data Preparation:

The Blue Tahiti team has extensive experience in bringing together data, from disparate sources and formats, to create a Single Customer View (SCV). As part of the migration process, we take on the task of preparing all client data for import into the C-Insight platform. Advanced automated processes of data standardisation, formatting and matching are applied in order to achieve a clean, single view of each record. This expertise helps save significant time for our clients.

Bespoke Configuration:

Each C-Insight module is carefully configured to accommodate the field headings within each client's unique dataset. In addition, client specific rules are applied to data capture and validation, as well as applications, registrations and other processes. This ensures that staff members require minimal training in order to fully utilize functionality and to enjoy the features and benefits of the platform.

Ongoing data hygiene is maintained through the application of various manual and automated processes. Bulk data imports are subject to automated matching processes in order to eliminate duplicate records, when appending information to existing records or adding new records.
Data input, via the back-end database and through the client website, is subject to customized validation processes. In addition, authorized staff have a 'dedupe/merge' function within a constituent record, to enable manual intervention where duplications are not picked up through automated processes.

Section 4: Integrated Functionality

The C-Insight platform only includes the functionality that each user organisation requires. This ensures that clients only pay for what they need and staff interfaces are simple and relevant. User group permissions determine what users can view and edit. Constituents can carry out all their tasks within the association website through single sign-in, secure access.

Member/Contact Management:

Manage all your member and non-member information, including individual and organisational/institutional records and links, as well as chapters all within a user-friendly single view.

- Create, edit and view records
- Manage contact notes and inquiry ticketing
- Manage preferences and communication flags
- View status, renewal history, event/education and financial transactions within a single record view
- Virtually unlimited contact and demographic fields
- Record merge and deduplication

Membership Process Management:

The Blue Tahiti team works with each user organisation to simplify and automate everyday processes.

- Manage multiple membership categories and pricing tiers
- Manage join steps and document uploads
- Automated renewal notifications
- Targeted email communications
- Member self-serve; auto-generated receipts and single sign-in access
- Reports and Queries (see Marketing & Communications for more)

Committees & Special Interest groups:

C-Insight provides a modern, user-friendly environment in which constituents can engage with each other and with the association for special projects and knowledge sharing.

- Set up open and closed groups, allocate roles and terms of office
- Member and non-member online joining
- Group email exchange, forums and document sharing
- Budget setting and expense monitoring
- Live activity and participation reports

Event Management:

Create and publish events and enable registrations and payments directly through the association website.

- Set up titles, venue and agenda details
- Build member and non-member pricing splits
- Create questionnaires
- Manage speakers
- Manage online registrations and payments, including registering multiple people at once
- Manage attendance and waitlists
- Publish event information and registration details to your website
- Track attendee information through live dashboards and reports

Education & Certification:

C-Insight enables you to manage your educational activity all within the integrated platform.

- Set up and publish training events
- Apply development hours and/or points to course module
- Manage and track certifications and scholarships
- Constituent self-serve enrollment and Professional Development/Certification tracking
- Live reports and dashboards

Shop/E-Commerce:

Enable constituents to purchase products, subscriptions and publications through the fully integrated online shop.

- Set up products with multiple formats and pricing
- Auto-generate invoices and receipts
- Manage stock and fulfillment
- View product purchase history at individual record and database-wide levels

Donations:

Enable your supporters to make one time and recurring donations via a user-friendly online interface.

- Donation/tributes/dedication Management
- Fundraising
- Reports

Financial Management:

Manage and view all payments and transactions within the C-Insight platform and integrate with accounting software. C-Insight is carefully configured to each association's accounting systems and processes.

- Import the association chart of accounts
- Manage General Ledger
- Integration with the association payment vendor
- Manage payments, deposits and refunds
- Manage deferred revenues
- API or semi-automated data exchange with accounting software
- Live dashboards and reports

Marketing & Communications:

C-Insight makes it easy and efficient to manage all your communications with your members and other contacts, whether one-off or regular automated notifications or invites, within the single platform.

- User-friendly query/list builder for one-time or regular communications
- Easily send an email to a contact directly from their record
- Data import and merge facility
- Manage suppressions and opt-outs
- Integrated ad-hoc or automated email blasts
- Integration with preferred 3rd party email delivery software
- Create, manage and track coded email campaigns
- Create formatted output lists for mail fulfilment
- Monitor performance through live reports and dashboards

Web Content Management:

C-Insight integrates directly with the association website to enable the publishing of content, forms and questionnaires. All constituent 'touch-points' capture and feed information, in real-time, to the back-end database.

- Constituents can self-serve for join, renewals, profile updates, directory content and more
- Generate events and training courses and publish to the website
- Publish forms and questionnaires
- Manage member and non-member engagement content and facilities

As the C-Insight platform is scalable and flexible, the Blue Tahiti development support team is able to configure client specific functions and processes. These may be driven by the client or may result from ideas provided by the implementation/account support team. If you have a requirement which falls outside of functionality covered in this document, contact us to discuss it and we will assess feasibility.

Section 5: Pricing

Blue Tahiti's pricing model is designed to ensure that user organisations can manage and predict the ongoing costs for the platform. Low set up costs, particularly for a bespoke solution, and no per head license cost often mean savings for our clients. Hosting, security, data storage/backup and performance of the platform is all taken care of and included in the fixed monthly costs.

The pricing information below is to be used as a guide only. **Each client installation is customised for the specific needs of the organisation**, which means that you only pay for the functionality you require. An accurate proposal can be provided following an initial exploration of requirements or on receipt of an RFP or similar document.

*Monthly costs are total costs for the numbers of users. It includes hosting, training, support and built-in **A**dditional annual **D**evelopment **H**ours (ADH = 7.5/day).

**Costs for additional email volumes to be confirmed on quotation.

	Staff	Records	ADH	Set-upCosts	Monthly Costs*
Level 1	Up to 5	Up to 20,000	5 days	£2000 - £4000	£475 - £650
Level 2	6 to 15	20,000 – 100,000	10 days	£2500 – £7500	£600 - £1350
Level 3	15+	100,000+	Quotation required	Quotation required	Quotation required

Module Function	Level 1	Level 2	Level 3
System Migration:			
Detailed requirements consultation	✔	✔	✔
Data consolidation, cleanse and formatting for import	✔	✔	✔
Client specific customisation of fields and processes	✔	✔	✔

Member/Contact Management:			
Create, edit and view records	✓	✓	✓
Manage contact notes and inquiry ticketing	✓	✓	✓
Manage preferences and communication flags	✓	✓	✓
View status, history, activity and transactions within a single view	✓	✓	✓
Virtually unlimited contact and demographic fields		✓	✓
Integrated Directory management	✓	✓	✓
Merge and deduplication within contact record		✓	✓
Membership Process Management:			
Manage multiple membership categories and pricing tiers	✓	✓	✓
Multi-step member application process		✓	✓
Document uploads	✓	✓	✓
Automated renewal notifications	✓	✓	✓
Targeted, automated email communications	✓	✓	✓
Member self-serve joining and renewal	✓	✓	✓
Reports and Queries	✓	✓	✓
Committees & Special Interest groups:			
Set up open and closed groups, allocate roles and terms of office	✓	✓	✓

Member and non-member online joining	✓	✓	✓
Group email exchange, forums and document sharing		✓	✓
Budget setting and expense monitoring		✓	✓
Live activity and participation reports		✓	✓
Event Management:			
Set up titles, venue and agenda details	✓	✓	✓
Build member and non-member pricing splits	✓	✓	✓
Create questionnaires		✓	✓
Manage speakers (searchable speaker records, activity & performance tracking)		✓	✓
Manage online registrations and payments	✓	✓	✓
Manage waitlists		✓	✓
Publish event information and registration details to your website	✓	✓	✓
Track attendee information through live dashboards and reports	✓	✓	✓
Education & Certification:			
Set up and publish training events	✓	✓	✓
Apply development hours and/or points to course module		✓	✓
Manage and track certifications and scholarships		✓	✓

Constituent self-serve enrolment and CPD/Certification tracking		✓	✓
Live reports and dashboards		✓	✓
Shop/E-Commerce:			
Set up products with multiple formats and pricing	✓	✓	✓
Online payments and auto-generated invoices	✓	✓	✓
Manage stock and fulfilment		✓	✓
View product purchase history at individual record and database-wide levels	✓	✓	✓
Donations:			
Donation Management (on/offline single payments or regular gifts)	✓	✓	✓
Fundraising			✓
Reports	✓	✓	✓
Financial Management:			
Import the association chart of accounts			✓
General Ledger management	✓	✓	✓
Integration with the association payment vendor (for on/off line payments)	✓	✓	✓

Manage payments, deposits and refunds	✓	✓	✓
Manage deferred revenues			✓
API or semi-automated data exchange with accounting software			✓
Live dashboards and reports	✓	✓	✓
Marketing & Communications:			
User-friendly query/list builder for one-off or regular communications/analysis	✓	✓	✓
Data import and merge facility (Copy & Paste)	✓	✓	✓
Manage suppressions and opt-outs	✓	✓	✓
Integrated ad-hoc or automated email blasts	Up to 5,000 pcm (**)	Up to 15,000 pcm (**)	Up to 30,000 pcm (**)
Integration with preferred 3rd party email delivery software		✓	✓
Create, manage and track coded email campaigns		✓	✓
Create formatted output lists for mailing/fulfilment	✓	✓	✓
Monitor performance through live reports and dashboards	✓	✓	✓
Web Content Management:			
Constituents can self-serve for join, renewals, profile updates, directory content, registrations and payments via 'Single Sign in'	✓	✓	✓

Publish forms and questionnaires		✓	✓
Manage member and non-member engagement content and facilities (examples include profiles, forums and knowledge sharing)	✓	✓	✓

Section 6: Support and Contacts

At Blue Tahiti we believe in forming a close, responsive and pro-active relationship with each of our clients. Our team will carry out an initial consultancy phase with your key staff to make recommendations as to how the system will best work for your organisation. The aim is to ensure that the C-Insight platform is fully customised to meet your needs ahead of the go-live date.

Following implementation, email, telephone and ticketing support is available during office hours and forms part of the fixed monthly costs. Monthly costs also include additional development time to cover any ad-hoc, post implementation work. All this ensures that ongoing costs are fixed and manageable.

We hold quarterly reviews with each client to ensure that the system continues to meet the needs of staff and members and to discuss how the platform can adapt and support the ongoing goals of the association.

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