



# Quarterly Partner Product Update

Bloomerang Partnership Team

The presentation will begin at 2:00 PM ET.

**Introduce yourself in the chat! We are live now.**

**Enjoy some behind-the-scenes discussion.**



# Before we get started...

**This presentation is being recorded.**

The recording will be emailed to you later today.

**Please drop your questions in the chat.**

We will answer them during the Q&A session at the end of the presentation.



# Product Spotlight



# Product Spotlight

- Bloomerang Learning
- Email
  - Email Builder
  - Mailchimp Integration
- Coming Soon
  - Improved Acknowledgements
  - Form Security Enhancements
- In case you missed it:
  - Verified First





# Bloomerang Learning

# Bloomerang Learning

*Intuitive, in-app, self-paced learning seamlessly integrated into every application.*



## Maximize your return

- **Streamline Onboarding**
- **Accelerate your Impact**
- **Make Your Investment Count**

# Demo

# Gain Access & Start Learning Today!

- **User Granted Accounts**
- **How You Can Request Access**
- **Look Forward to Learning**

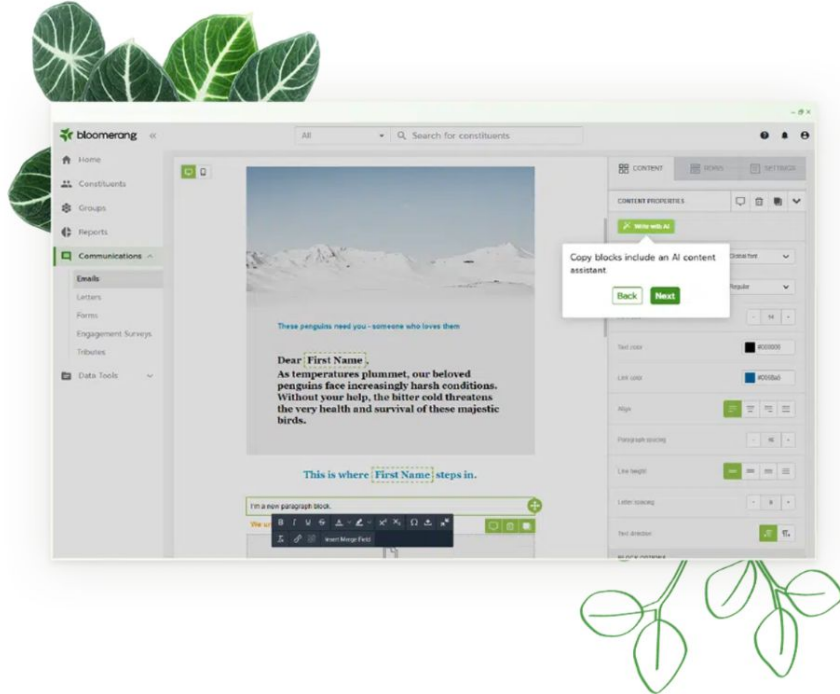




A cluster of large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left corner of the slide.

# Email Builder Enhancements

A single large Monstera leaf with a hole, positioned in the bottom-right corner of the slide.



## AI CONTENT ASSISTANT

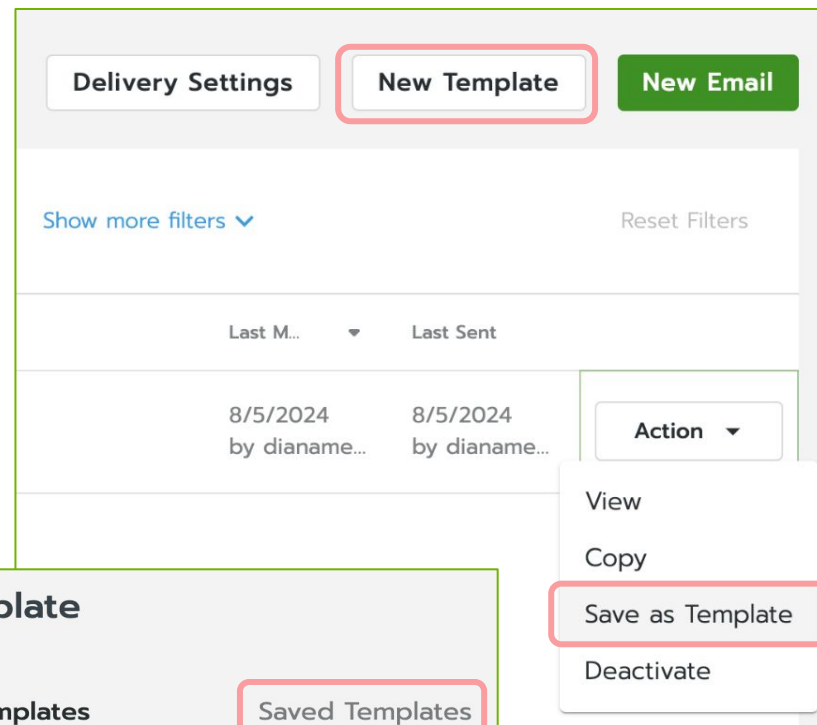
# Crush writer's block with the power of AI

Experience the game-changing power of Bloomerang's industry-leading AI content assistant, available right where you need it to help you seamlessly craft personalized emails and watch your impact soar.

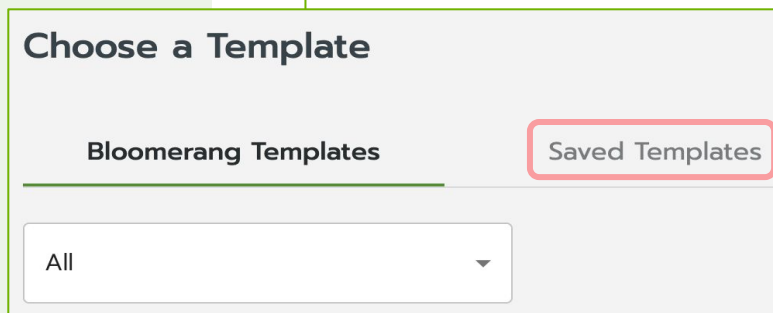
[Take the Tour →](#)

# Saved Templates

- **Time-Savings & Efficiency**
- **Consistency & Scalability**



The screenshot shows the Bloomerang interface with three buttons at the top: 'Delivery Settings', 'New Template' (highlighted with a red box), and 'New Email'. Below the buttons is a table with columns for 'Last M...' and 'Last Sent'. A row in the table shows '8/5/2024 by dianame...' for both columns. An 'Action' dropdown menu is open over the table, showing options: 'View', 'Copy', 'Save as Template' (highlighted with a red box), and 'Deactivate'.



The 'Choose a Template' dialog box has two tabs: 'Bloomerang Templates' and 'Saved Templates' (highlighted with a red box). Below the tabs is a dropdown menu with 'All' selected.



# Sent Emails

- **Message Integrity**

Tracking   Header   Design   **Recipients**

### Email Interests

Event
Newsletter
Volunteer Information

### Expanded Filters View

**Include**  
Constituent is 'Diana Otero'

---

**Exclude**  
Status is 'Inactive' or 'Deceased'



# Demo

Large, vibrant green monstera leaves with characteristic holes, positioned in the top-left and bottom-left corners of the slide.

# Mailchimp Integration Improvements

A smaller monstera leaf in the bottom-right corner, partially cut off by the edge of the slide.

# Enhanced Mailchimp Integration

- Add email data to constituent profiles.
- Understand email interaction.
- Create messages that resonate.



# Mailchimp Mappings

- **Bloomerang Groups to Mailchimp Tags** (internal segmentation)
- **Bloomerang Email Interests to Mailchimp groups** (external segmentation)

### Mailchimp Mappings

Complete at least one mapping to link your Bloomerang CRM Database with Mailchimp.

[Go to Mailchimp](#) [Sync Now](#)

Mapping Type	Bloomerang Field	Mailchimp Field	# of Synced Constituents	
<input type="text" value="Mapping Type"/> Bloomerang Group to Mailchimp Tag	<input type="text" value="Group"/> Alumni	<input type="text" value="Tag"/> alumni	-	<a href="#">Delete</a>
<input type="text" value="Mapping Type"/> Bloomerang Email Interest to Mailchimp Group	<input type="text" value="Email Interest"/> Event	<input type="text" value="Group"/> Event	-	<a href="#">Delete</a>

Rows per page: 25 1-2 of 2

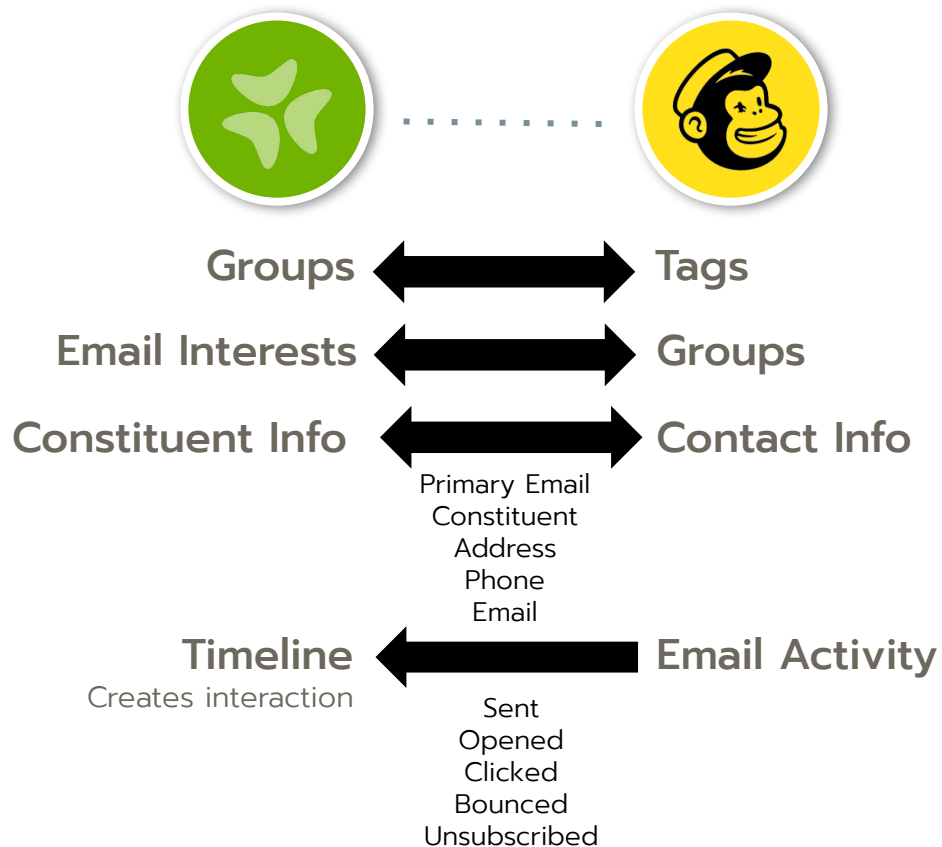
[Add New](#) [Save and Sync](#)

Connected Mailchimp Account: thomas.gappmayer@bloomerang.com [Deactivate](#)

Mailchimp Audience: BLOOMERANG TEST [Edit](#)



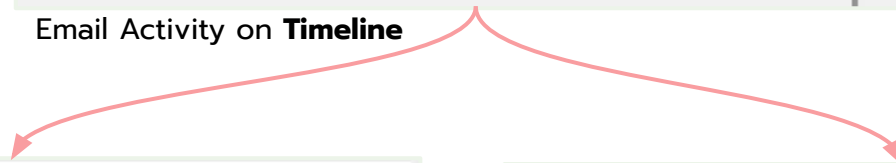
# Bloomerang + Mailchimp



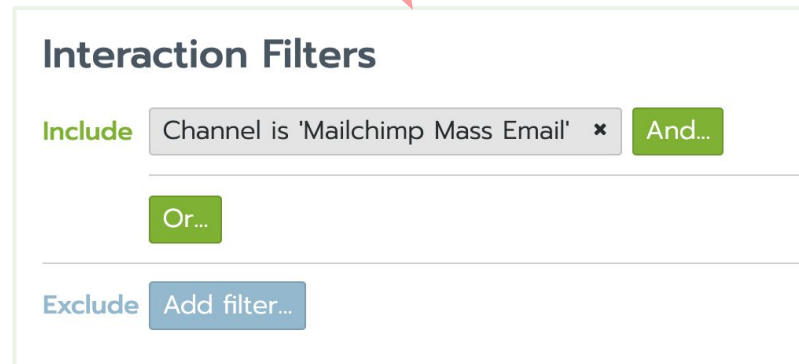
# Mailchimp interactions to Bloomerang



Email Activity on **Timeline**



Mailchimp activity is factored into **Engagement Level**



**Mailchimp Mass Email** available as an interaction filter

# Demo

**Coming Soon!**



# Improved Acknowledgements

- Enhance donor trust.
- Strengthen donor connections.
- Maximize operational efficiency.



# Improved Acknowledgements

### Online Payment Confirmation Receipts

Payment confirmation emails are automatically sent when a transaction is processed by a scheduled donation event or a donation made via the mobile app. Bloomerang will generate a default email receipt for each transaction below unless otherwise specified.

Payment confirmation email for payments made via an online form are set in form settings.

Automatic Receipting On

Select the email you would like automatically sent to the constituent when a **one-time payment** is created.

Zach's Custom Receipt ▾

Select the email you would like sent to the constituent when a **pledge payment** is auto-processed.

Bloomerang Default ▾

Select the email you would like sent to the constituent when a **recurring donation** is auto-processed.

Bloomerang Default ▾

Select the email you would like sent to the constituent when a **membership dues payment** is auto-processed.

Bloomerang Default ▾

### Acknowledgements

**Has this donation been acknowledged?**

No  Yes  Do Not Acknowledge

**Send an acknowledgement?**

Letter  Email  No

Select Email\* ▾

# Demo

# Form Security | reCAPTCHA V3

## Update Overview

Bloomerang Forms will now accept Google reCAPTCHA V3. This will help reduce fraudulent activities while streamlining the donation process.

All sel

## Action Requested

All customers with a self-hosted Bloomerang Form will need to update their reCAPTCHA to maximize security.

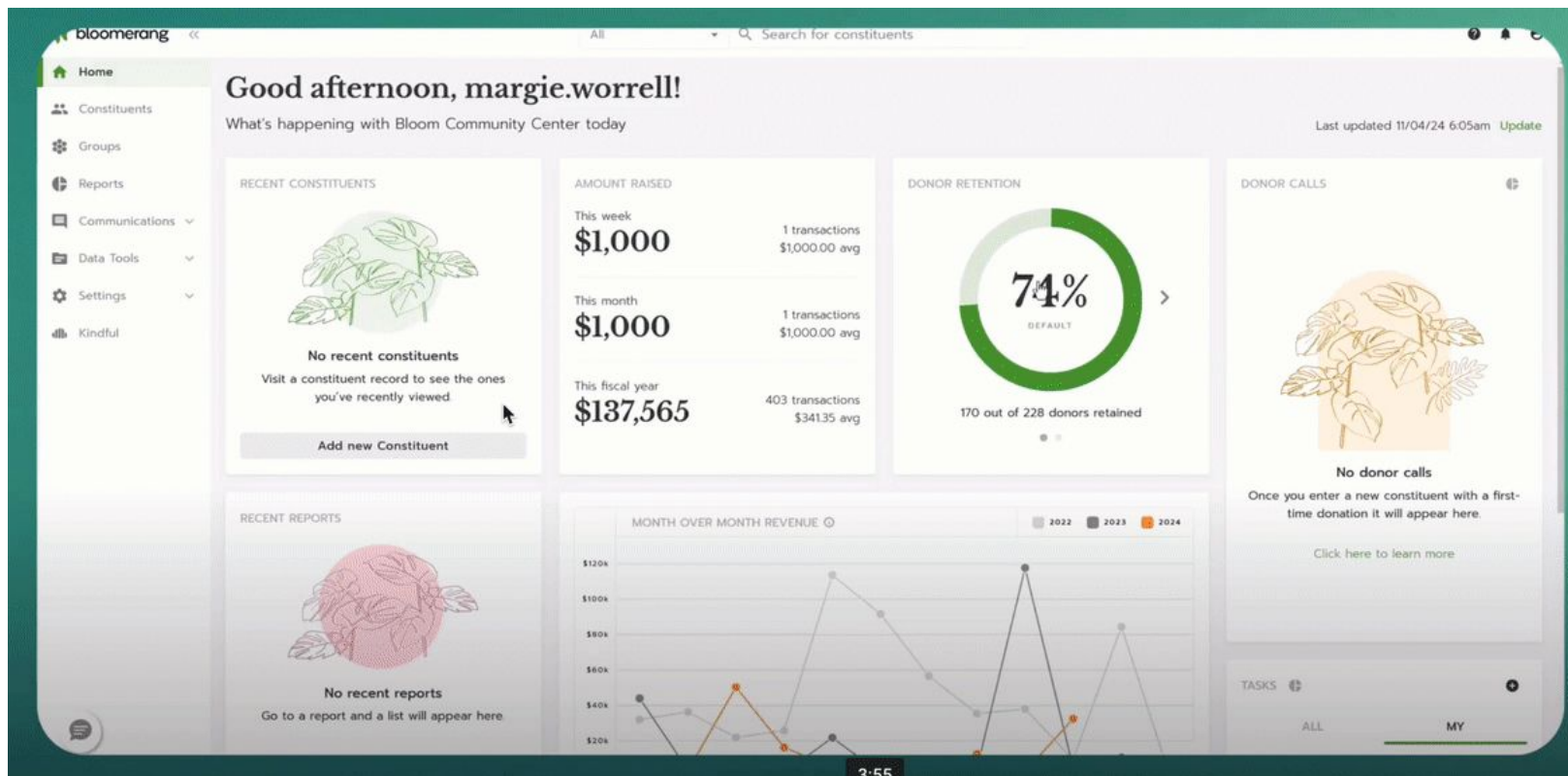
Please work with your nonprofit customers to upgrade their self-hosted Bloomerang Forms to reCAPTCHA V3. Read this [help article](#).

*Note: This update does not yet cover custom self-hosted Bloomerang Forms.*





# Bloomerang Forms reCAPTCHA V3



The screenshot shows the Bloomerang dashboard for user margie.worrell. The dashboard includes a sidebar with navigation options: Home, Constituents, Groups, Reports, Communications, Data Tools, Settings, and Kindful. The main content area features several key metrics and reports:

- RECENT CONSTITUENTS:** No recent constituents. A message states: "Visit a constituent record to see the ones you've recently viewed." There is an "Add new Constituent" button.
- AMOUNT RAISED:**
  - This week: \$1,000 (1 transactions, \$1,000.00 avg)
  - This month: \$1,000 (1 transactions, \$1,000.00 avg)
  - This fiscal year: \$137,565 (403 transactions, \$341.35 avg)
- DONOR RETENTION:** A donut chart shows 74% retention (170 out of 228 donors retained). The chart is labeled "DEFAULT".
- DONOR CALLS:** No donor calls. A message states: "Once you enter a new constituent with a first-time donation it will appear here." There is a "Click here to learn more" link.
- RECENT REPORTS:** No recent reports. A message states: "Go to a report and a list will appear here."
- MONTH OVER MONTH REVENUE:** A line chart showing revenue from 2022 to 2024. The y-axis ranges from \$20k to \$120k. The chart shows data points for each month across the three years.
- TASKS:** A section at the bottom right with "ALL" and "MY" filters.

The dashboard is updated as of 11/04/24 6:05am. A video player control at the bottom center shows a timestamp of 3:55.

Large, vibrant green Monstera leaves with characteristic holes are positioned in the top-left and bottom-left corners of the slide.

# In Case You Missed It

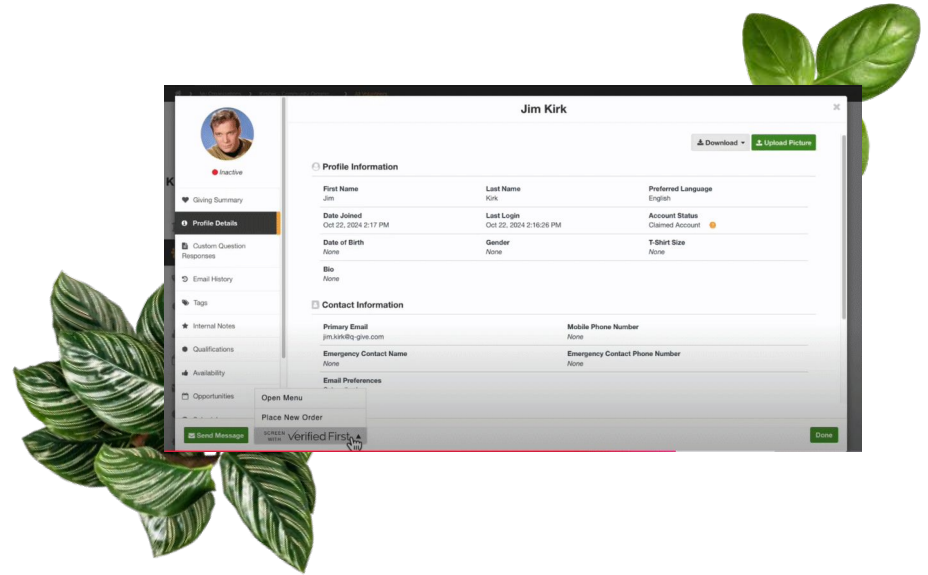
A faint, light-colored image of a person's face is visible in the background, centered behind the main text.

# Verified First Integration | Background Checks

*Integrated Background Checks: top-notch efficiency, outstanding service, exclusive price*

## Elevate your volunteer experience

- **Optimize Your Resources**
- **Enhance Volunteer Retention**
- **Simplify Onboarding**
- **Centralized Data Management**



# Partner News



# Upcoming Conferences

- **AHP International**
  - Nov 6-8 | San Diego, CA
- **Nonprofit Storytelling**
  - Nov 11-13 | Santa Fe, NM
- **Nonprofit Summit of the Midlands**
  - Nov 14 | La Vista, NE
- **AFP Polk National Philanthropy Day**
  - Nov 15 | Lakeland, FL
- **National Philanthropy Day Golden Gate**
  - Nov 15 | San Francisco, CA
- **VAFCC Annual Conference**
  - Nov 17-19 | Williamsburg, VA
- **Nonprofit Leadership Conference**
  - Nov 18 | Tampa, FL
- **First Tee Network Summit 2024**
  - Nov 18-21 | Phoenix, AZ
- **BGCA Northeast**
  - Nov 19-21 | Pittsburgh, PA



# GivingTuesday Day-of Updates

- **When:** December 3, 2024
- **What:**
  - Highlight success of Bloomerang organizations on GivingTuesday
  - Announce winners of \$15,000 giveaways!
    - 3 drawings of \$5,000
- **Where:**
  - [GivingTuesday Page](#)
  - [LinkedIn](#)





# Spread the Joy with Bloomerang

**REFER A CLIENT, AND WE'LL DONATE \$250 TO THE NONPROFIT**

Refer a client and we will donate \$250 to the nonprofit when they **purchase by December 31st**.

Plus, the nonprofit will still receive their exclusive partner discount.





# GIVECON 2025

February 23 – February 26, 2025 | Orlando, FL

*Where the best  
in giving gather.*

- Hyatt Regency Grand Cypress, Orlando, FL
- Feb 23 - 25, 2025
- Partner Pre Conference session
- 48 sessions in 3 tracks
- CFRE Credits
- Networking







# Streamlining Services: Creating Processes and Products that Sell

**Wednesday, Dec 4**

**2PM ET | 11AM PT**

**Marie Palacios**

**Lead Consultant, Funding for Good**



# Q&A



Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

**Would you like  
additional information?**

A smaller portion of a Monstera leaf, located in the bottom right corner of the slide.