

Changing the Way People Change the World

“ We kept asking vendors to explain how they would help us with a tool that kept the “what” of relationships independent of the “who”. roundCorner indicated early on that they get it and their solution is well-suited for the ‘business of mission’.”

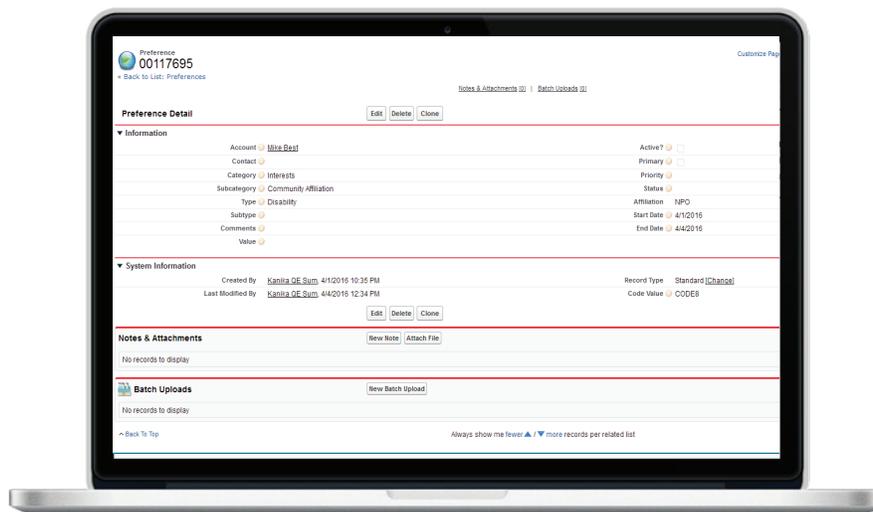
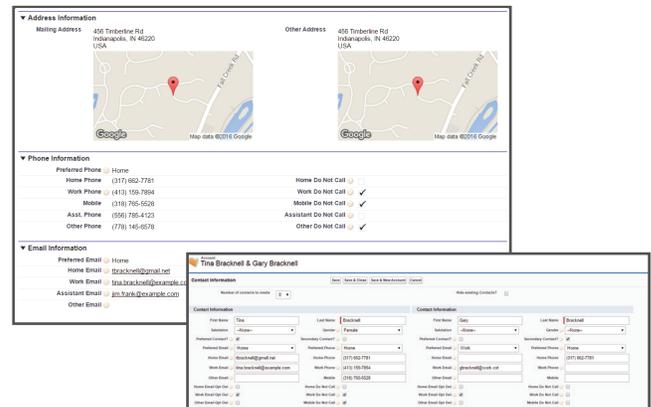
Welles Hatch, Chief Information Officer



Your Single Source of Truth for CRM

Today's constituent expects you to know them on a deeper level. But when you manage data in disconnected databases and spreadsheets, it becomes challenging to build a comprehensive image of your constituents.

Bios is a best-in-class data architecture and feature set that makes Salesforce work the way nonprofits and universities manage and engage constituents. It helps you establish a 360° view of each individual in your database. Enable staff to track everything from constituents' relationships and historical interactions to personal preferences, so you can better personalize your message, truly engage them in your mission and accelerate your fundraising and CRM efforts.



Core Features

Constituents

Save and manage all of your constituents' information in one single place and establish a 360° view of each of them. Set up preferred contacts, email and phone to better personalize your message to them, and integrate all of your email marketing activities to more effectively segment your constituents based on your fundraising campaign.

Address Management

Always know how to best reach out to your constituents with flexible address management capabilities. Use Bios to set up and manage address types, preferred addresses and year-round seasonal addresses with effective dates, and stay up-to-date with Do-Not-Mail addresses.

Preferences and Interests

Get to know your constituents on a deeper, more meaningful level by setting preferences based on affinities, associations and more. Now you have the ability to know what your constituents like, what they don't like, who they follow and advocate for, so you can approach them with more confidence.

Relationships

Build a complete map of the relationships your supporters have by deepening your understanding of how a constituent relates to other records in your database: from person to person, person to household and organization, and organization to organization. When you have a complete view of your constituents' networks, you can more easily keep track of giving through a third party, and make sure the right person receives the credit they deserve.

Action Plans

Use action plans in Bios to cultivate prospects more effectively and turn them into engaging constituents. Create task lists and reminders for business processes, assign and customize tasks to your staff and build templates to quickly add future tasks to action plans.

Reporting

Leverage more than 250 editable reports and dashboards to gain better insight into your organization's fundraising and CRM efforts. Measure real-time impact in a way that works best for you.

Seamless Integration

Bios is interoperable with thousands of applications from the Salesforce AppExchange, the world's #1 marketplace for business applications. No coding required!

Use Cases

Bios is used to leverage the powerful capabilities of NGO Connect and Advancement Connect. It supports all of your fundraising activities and allows nonprofit and higher education staff to build a complete personal history of each constituent by recording every interaction across the organization.

About roundCorner

roundCorner is dedicated to helping enterprise nonprofit organizations, higher education institutions and foundations become truly constituent centered. We empower our customers with comprehensive fundraising, CRM and grants management solutions built on Salesforce.com, so they can connect with each of their constituents from one single place and better achieve their mission.

roundCorner is a Salesforce Platinum ISV Partner. We are also the first Salesforce.org Platinum App Partner for the enterprise nonprofit and higher education markets in North America and a Salesforce Ventures Portfolio company.

In 2016, roundCorner has committed to integrate corporate philanthropy by joining Pledge 1%, a movement spearheaded by Salesforce.org that encourages companies to contribute a portion of their future profits to support philanthropic organizations in their communities.

