

engaging
NETWORKS

Product Development

Journal - 2019

2019 Product Development Journal

Whenever I'm asked to explain the success of Engaging Networks, my response is always the same: 'we are a product-driven company'. We invest the revenue from our clients back into the development of the product like nobody else.

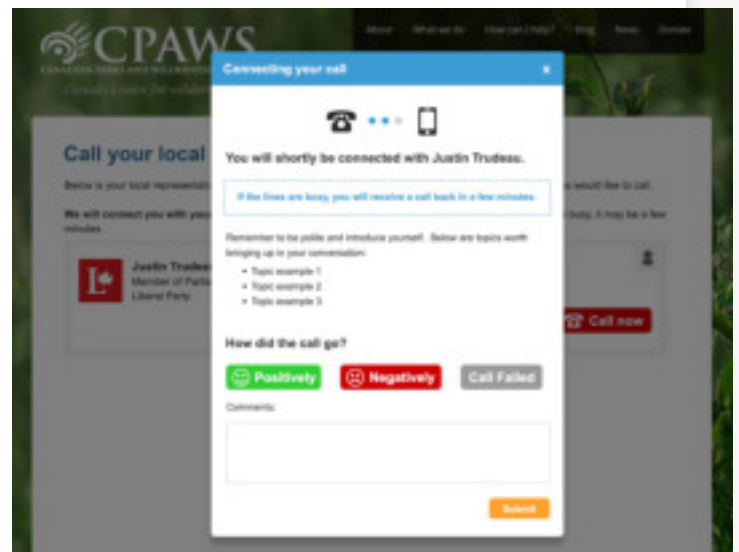
I have overall responsibility for what we build every year. It's the most interesting part of my job hands down. Outside of our formal development tools I keep a running tab of what we release during the year, and I thought it might be interesting to share my notes with our clients and friends. Think of it as a sneak peak into how I track what we prioritize and what we deliver. The writing isn't always pretty but I hope my notes tell a story of innovation, hard work and amazing output. It will be more of the same pace of great innovation in 2020. Stay tuned for the 2020 Technology Roadmap.

Graham

Graham Covington
Founder & CEO
Engaging Networks Limited

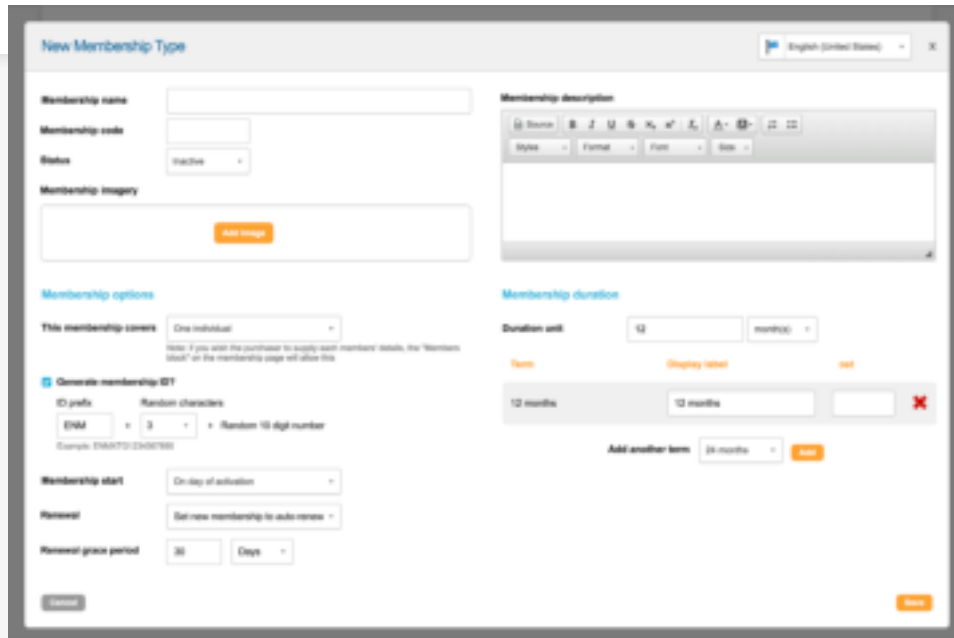
February 22nd 2019

- page-builder: Click-to-call module (US databases, Canadian database, UK databases);
- ENS: adding two additional transaction types to output;
- ENS: set origin source when submitting data via the API;
- ENS: lookup a supporter, and change origin source (single record);
- ENS: service to confirm that API transactional data is ready to download;
- UDX: Saved queries now have foldering, search, and ordering on the page;
- page-builder: possible to import membership transaction data (new module only) - data import page in the dashboard;
- page-builder: partial clean-up of the old page-builder technology;
- account: Adding a setting to allow clients to set the number of days following the initial re-try of a



failed transaction to re-try the card process;

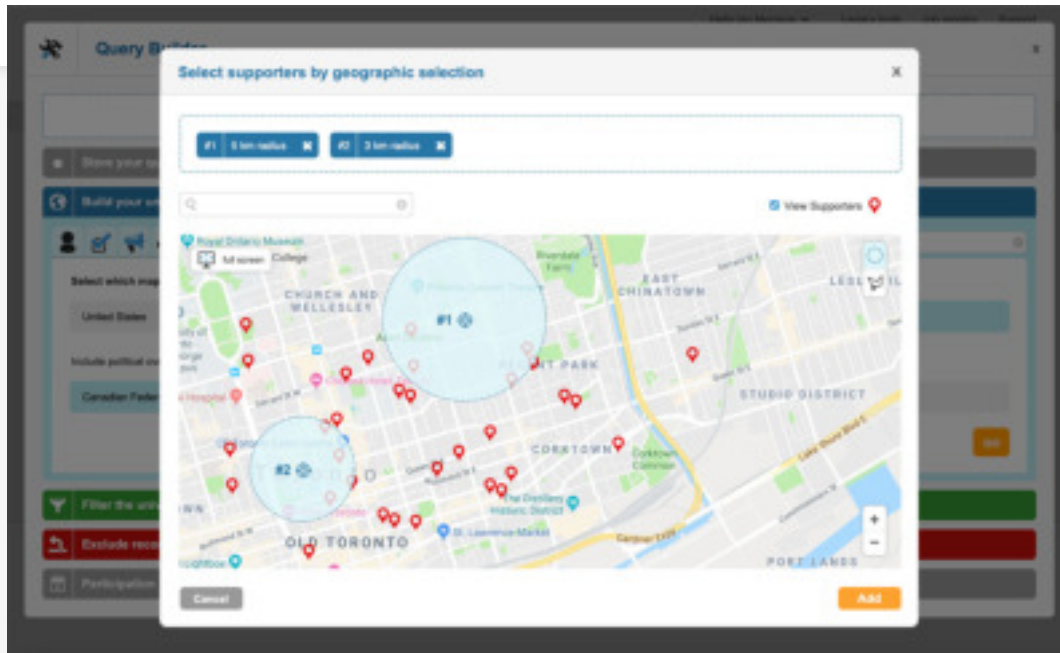
- bulk email: clients can determine if emails should be sent to constituent records on an active marketing automation stream;
- account: improvements to client login process;
- page-builder: allow for free memberships in the new membership module;



April 12th 2019

- multiple 'IF' queries to better qualify constituents for a workflow (e.g. 'if import tag equals 'oranges' or 'bananas' or if 'this field value equals 'values', etc.);
- donation page type: email clients with fraud notification when a page is being blocked;
- survey page type: build a new page type for clients to create dynamic surveys and dashboard reporting of the data;
- find a replacement for Google shortner;
- marketing automation: add template for every successful recurring transaction processed and every failed recurring transaction;
- e-cards page type: scheduling the delivery of e-cards (already available in e-commerce module);
- ENS: Rest API expose meta question data;

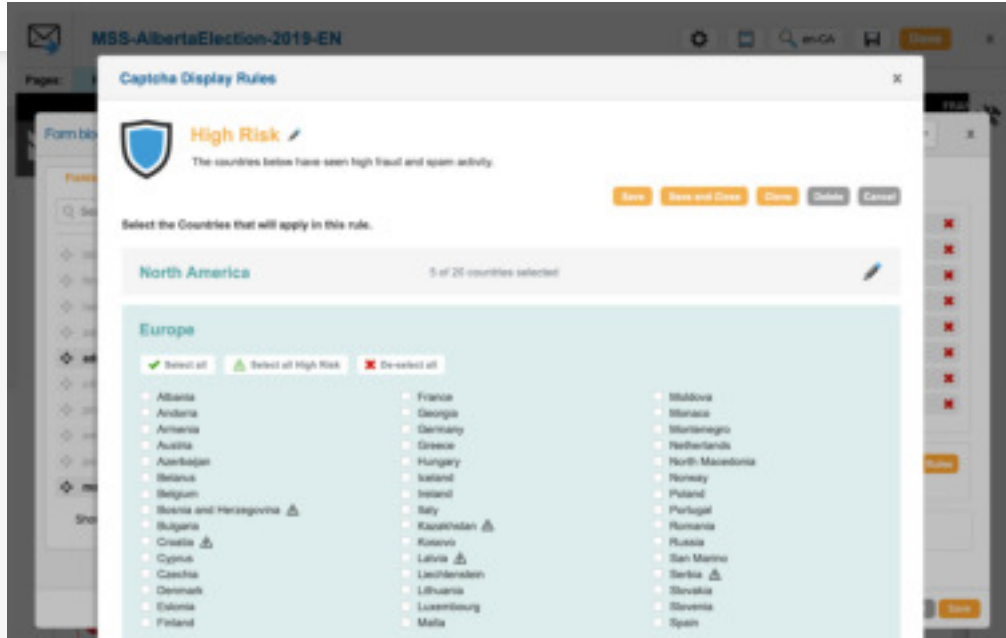
- ETT page type: schedule sending messages for individual campaigns;
- membership: add membership 'data' (e.g. membership status, membership type, membership term, etc.) UDX query builder;
- payment gateway: Moneris; add Verified by Visa
- data: geo-location for UDX for exporting data and audience selection for bulk email;



June 14th 2019

- security and ENS: add IP checking on Rest API calls for supporter data (all calls);
- membership page type: add membership 'data' (e.g. membership status, membership type, membership term, etc.) in profiles;
- PSD2 compliance: Paypal, Stripe and Payflow are all being updated;
- UDX: multi email selector;
- ETT page type: reference data (integrate with UI, moving over to new pages);
- manage supporters: option to download all transactions for any supporter;
- fraud: allow clients to block IPs from specified countries (e.g. block all IPs from 'Russia', or e.g.

- enable captcha if IP address is from 'Russia');
- fraud: high rejections summary notification email to clients (runs once daily);
- security: add audit trails of account activity by account client users (page edits, lookup supporters, account user creation and deletion);
- page-builder: warning message to indicate that a page is being edited by another account user;
- page-builder: insert tool for required PDD (direct debit) confirmation data (e.g. key values) in thank you emails;
- page-builder: introduce blue print visual editor to client accounts, and update editor in Master Dashboard;
- marketing automation: SMS messaging channel
- page-builder: allow clients to specify the sender for e-cards
- bulk email: ability for advanced users to edit the HTML in the drag and drop content (as we do in page-builder)
- AI machine learning: build the content classification layer for emails (data is stored on the EN side);
- donation page type: add smart 'smart recaptcha' to forms to help prevent fraud



September 6th 2019

- reporting: 'tally tool' (a filterable list of individual and total donations, daily, etc);
- security: display audit trails of account activity by account client users (display in UI with download option);
- security: create audit trails of account activity by account client users (account preferences, default account record, tokens, gateways, permission groups, account emails, content ownership, highest previous contribution);
- click-to-call page type: email notification should the client reach 80% of budget;
- marketing automation: add more complex filters at decision points within a workflow (fundraising);
- bulk email: ability for clients to define a 'master opt-in' question so that ESPs like Google can display an 'unsubscribe' link (as opposed to having a landing page to manage subscriptions);
- bulk email: account settings for DKIM / domain authentication that clients can use to automate authentication;
- data export: Origin Source values are now exposed in export files
- profiles: attributes have been added as a filter
- profiles: added 'membership' filters

October 4th 2019

- hub: add a single sign-on using OKTA;
- political exchange: update to dashboard page UI and page flow
- APIs: additional security to restrict data access for APIs using public tokens

November 15th 2019

- ETT page type: adding the ability to select targets at the start of a campaign, and adding US committees and sub-committees
- donation page type: improvements to receipting by being able to add local time zones
- page-builder: improvements to the page JSON object to indicate a re-direct is being used
- manage supporters: added new data to a supporter record (peer-to-peer gift referrals, whether supporter is on a CRM segment, marketing automation activities)
- AI machine learning: APIs for marketing streams back to Engaging Networks marketing automation
- AI machine learning: creation of content libraries that validate whether content is required for specific use cases
- AI machine learning: reporting interface to display conversion rates compared to account benchmark
- AI machine learning: integration with marketing automation workflows
- AI machine learning: remaining work for the first use case (upselling single donors)

