



Overview

Kaos is a robust “business in a box”, paperless web-based platform for managing your in-house telephone campaigns. Kaos was built by professionals with over 26 years’ experience in telefunding and telesales campaigns for arts and cultural organizations. We have designed Kaos as a solution to manage your in-house campaigns.

Kaos is a full-featured solution to manage and advance telephone fundraising and ticket/membership sales campaigns. Kaos will run any combination of these campaigns:

- Telephone fundraising / telefunding for annual campaigns
- Telephone subscription and/or membership campaigns
- Any necessary collection/follow-up calling on unpaid gifts
- Thank-you campaigns

Special campaigns including promotions, capital campaigns and more. Any large scale contacts you need to make with your donor and/or patron base can be managed in Kaos.

Kaos is not provided in module format, but rather as an all-inclusive, affordable turn-key platform that includes everything needed to run an in-house telephone campaign. lead management and strategy, your messaging and training material management, and last but not least – associate and campaign performance management. Kaos even includes the phones and an unlimited U.S. & Canada calling plan (no phones/phone lines are needed). With a high-speed internet connection, all of Kaos will work for you. Our integrated system means simplicity for the management of your call room(s).

Technical requirements

Kaos is built to operate in the most current version of the Chrome web browser. All functionality (including the VOIP phone functionality) works inside Chrome. Desktops (PC or Mac), laptops, or Chromebooks will work with Kaos, and Kaos requires no installed software. A business-class high speed internet connection is recommended, along with USB headsets for the computers.



Kaos' data, tools, and reports are housed in the cloud and can be built to connect to your organization's database directly via API, or can run as a standalone system with data import/maintenance functionality.

Features & Benefits

Database connectivity: in Beta development

Kaos is designed to interface directly with your database, eliminating the need to import and update data for your phone campaigns. We've designed Kaos to work with Tessitura's REST API. Additionally, Kaos has its own API, to integrate with myriad other databases (requires a mapping and implementation partnership with us).

With API implementation, users benefit in the following ways:

- Eliminate redundant data entry of fundraising gifts and subscription/membership sales
- Kaos data is updated when your master database records are updated (names, addresses, phone numbers, giving and buying histories)
- Real-time seat selection for subscription sales

Should you choose not to pursue one of our API implementation options, Kaos is also designed "out-of-the-box" with a user-friendly data import and maintenance wizard. Technical database knowledge is not required to import and maintain data for your telephone campaigns.

Reporting & Analytics

Kaos comes with a full host of reports to both process transactions and manage campaign and caller performance:

- Daily activity and transactions
- Database updates and refusal activity
- Campaign and caller level performance
- Workload management of your lead pools and calling strategies
- Intelligent workload and workforce management based on campaign forecasts
- Powerful Supervisor / Agent Dashboards: Supervisors and agents can track any aspect of a current campaign using our dashboards to highlight trends, identify whether you are on target to meet set goals and using key KPI's enabling you to make more informed business decisions.



- A large suite of reports to help you measure every aspect of your campaigns. If we don't have a report that provides exactly what you are looking for you can use our comprehensive report builder to get at the metrics you need. With exports to popular formats like CSV and report scheduling capabilities, Kaos has all your reporting needs covered.

Workload Management

Kaos will help you manage your lead pools and calling strategy. Kaos includes customizable rules-based lead penetration and calling schedules. Additionally, Kaos' goal is to help you coordinate all telephone based activities in your organization: fundraising, marketing, thank-you calls and more. By better managing your patron's experience, you will avoid patron/donor phone fatigue and realize better results from your campaigns. Your calling strategies will be built to correlate with your campaign goals.

Kaos allows you to create multi-level campaigns and stages for any type of calling campaign, be it telefunding, telemarketing, fundraising or anything that requires agents to make lots of calls and perform actions based on those calls. You have complete control of which agents service which campaign stages and at what times leads can be called.

Based on your campaign goals & projections, Kaos will plan your calling strategy to leave no stone unturned, and no needles in the haystack.

Workforce Management: Future release

Beyond managing fundraising and marketing leads, Kaos' Workforce Management functions provide tools for people management. We address:

- Staff scheduling, planned to coordinate with campaign needs. Fundraising and marketing associate schedules are driven by when your donors and patrons need to be called to maximize responsiveness
- Attendance tracking
- Payroll management: hours and incentive/bonus tracking for your staff



Dialing & Call Recording

Kaos is built as a “progressive” dialer (not “predictive”). Your fundraising and marketing associates will operate at their maximum productivity, while properly managing your patron relationships (no hang-ups on patrons, no delays when they answer the phone). Progressive dialing essentially keeps the outbound call flow moving, but doesn’t dial patrons when callers aren’t available.

- Provides call wrap-up time for callers and automatically moves to the next outbound call
- All calls are recorded and tagged to each record’s call history for future review
- Outbound caller ID customized to push out a specific number you designate for the campaign
- With calling features built into the platform, all you need is an internet connection. Agents can work for any location, no costly bills for installing and maintaining your own phone system and no long periods of downtime causing a serious loss of revenue.

Flexible Disposition Screens

Agents can wrap-up calls using a number of pre-defined disposition screens. Whether they need to take payment information, schedule a callback or take information pertinent to your campaign, Kaos has you covered.

Relationship Management

Kaos is built with your patron relationships at its forefront. Instead of managing fundraising and marketing campaigns separately, Kaos can bring them together. Kaos’ tools will plan timing of calling so fundraising and marketing do not step on each others’ toes.

Additionally, Kaos will allow you to build a plan for lead groups that spells out the timing of contacts for each patron over the year (fundraising ask, subscription ask, thank-you call, fundraising second appeal, and more).

Of equal importance, Kaos keeps it simple. Long term and in-depth planning can be hampered by complexity, but Kaos is designed to build automated patron contact plans around common lead groups.



Kaos also includes a fundraising gift fulfillment module:

- Initial and follow-up donor invoicing for donors not paying on credit card
- Ability to customize content of donor invoices, which can be sent via e-mail or paper – depending on donor preference

Implementation & Setup

Kaos is being built to work with Tessitura’s REST API. Alternatively, you can use our API if you’re not on Tessitura. Once the API is configured, setup is simple:

- You’ll “promote” the records to the specific phone campaign to be worked, and Kaos does the rest
- For telesales campaigns, you’ll set product selections available to telesales associates
- You’ll build training materials and campaign / segment messaging to appear in Kaos

Don’t want to (or can’t) use an API? Kaos has an easy data import (and update) tool to push your data into a calling campaign. Our data import and update tool does not require technical database experience.



Training, Consultation & Support

Kaos implementation includes system, API, and campaign setup training. Kaos also includes 7 day per week, 1-hour support time during calling hours for the life of the relationship. Your Kaos relationship also includes unlimited lifetime product upgrades.

Blueprint offers a host of additional training and support modules, separate from the Kaos implementation, as desired:

- Fundraising and marketing training
- Campaign messaging development
- Donor and patron incentive development
- Hiring & training of new-hire telephone fundraisers and marketers

Any telephone campaign is only as successful as its people – both the callers and managers. Kaos does not replace your people. It is a management tool to take your campaigns to an entirely new level of productivity and relationship management.



Pricing

Eliminate your paper-based telephone campaigns affordably, without the need for developing new systems or high setup costs. Depending on your need and budget, Kaos can be implemented in one of three ways:

1. Blueprint Advancement hosted and managed: this is the quickest, simplest way to get you up and running. We'll manage the import/export of data and reporting, and your callers can be up and running quickly.
2. Blueprint Advancement hosted and managed by you: we can implement Kaos in two phases to get you up to speed on this robust system. You have full control over day to day management of the system.
3. Blueprint Advancement hosted, managed by you, and integrated with your donor and ticketing database: This is the most fully integrated solution and eliminates the need for data imports/exports and gift and sale transaction processing.

Kaos is affordable and requires no long-term contracts. Our pricing structure is based on the following:

- Setup fee (nominal and scalable dependent on your situation)
- A nominal monthly fixed fee
- A monthly fee per user

Your Kaos pricing includes everything in this document, including the local & long-distance calling plan for the US and Canada. Phones/phone plans are not required to use Kaos.

Additional fundraising and sales strategy, people management, and training & messaging consultation is available a la carte as desired.



Kaos generates more revenue

- Your fundraising and sales associates make more calls and are more productive
- ALL patron relationships are managed like your major donors: planned communication throughout the year & season results in a more cohesive messaging for your organization. All this results in and larger fundraising gifts and more robust, long-term relationships with your patrons at all levels.

Kaos cuts expenses

- Reduced or eliminated labor spent importing and maintaining a separate database for your telephone campaigns
- Elimination of fundraising gift entry, subscription sales order entry, and sales order seat selection when using an API
- Reduced time managing telephone associate schedules (and more effective hours of production for your campaign)
- Reduced time managing payroll hours and incentive payments for your telephone associates
- Easy setup – requiring minimal physical and IT resources
- Paperless environment eliminates waste, printing costs (for leads and training materials), and significantly improves efficiency



The following pages represent a few screenshots from a variety of Kaos functions:

Agent dashboard

The screenshot displays the Agent Dashboard for Agent 101. The interface includes a sidebar with navigation options like Reports and Tickets, and a main content area with several data panels:

- Call Counts:** 7 Total Calls Made Today (98% ↑)
- Call Duration:** 00:03 Average Call Duration Today (20% ↓)
- Answered Call %:** 14% % Answered Calls Today (15% ↓)
- Wrap Up Duration:** 01:09 Average Wrap Up Duration Today (38% ↓)

Additional panels include:

- Giving History:** A table with columns for Last Year, Amount, and LY EG. Rows include 1yr Lap, 2yr Lap, 3yr Lap, Lapsed 4+, and Last Gift details.
- Donor / Patron:** Details for Hadley Whitley, including contact numbers and last donation date (19/07/2011 00:00:00).
- Call Controls:** Status: Active, Campaign: Fundraising, Client: Sample Arts Organization, and buttons for Dial, Mute, and Hangup.



Agent resolution screen

The screenshot displays the 'Agent | Dashboard' interface. A modal window titled 'Ready for payment capture' is open, containing the following fields:

- Donation Amount:** Enter USD amount
- Card Number:** Enter 16 digit card number
- Security Code:** Enter CVV digits
- Cardholder Name:** Enter name as it appears on the card
- Call Notes:** Client was really keen to donate and would like a call back in 3 months to know what offers are available for season tickets.

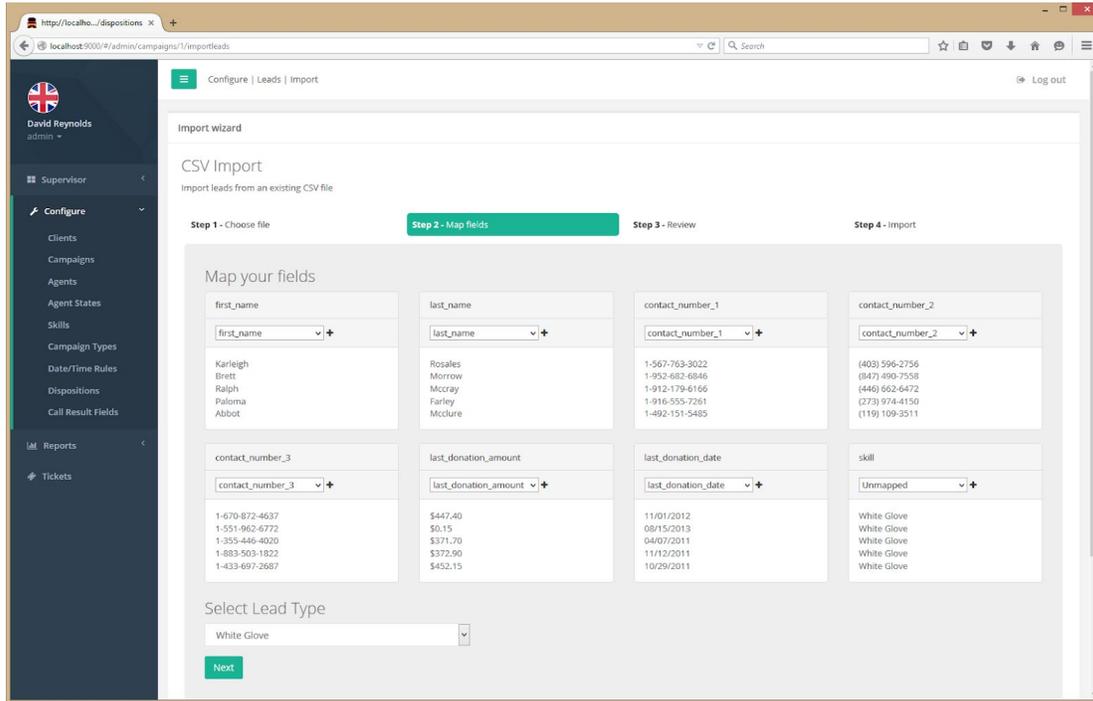
The background dashboard shows 'Call Counts' (0 Total Calls Made Today, 98% ↑), 'Campaign Messages', and 'Training Materials'. A 'Wrap Up Duration' section shows 00:00 (15% ↓) and 30% ↑. A 'Status: Active' banner is visible, along with campaign details for 'D50 Fundraising' and a table with columns 'Duration', 'Status', and 'Result'.

Supervisor view

The screenshot shows the 'Supervisor | Agent Status' interface. The left sidebar lists navigation options: 'Supervisor', 'Agent Status', 'Configure', 'Reports', and 'Tickets'. The main area displays five agent status cards:

- David Reynolds (101):** Active, White Glove, Current Campaign: Sample Arts Organization Fundraising, Current Lead: Not active, Current Call Status: Idle.
- Joe Bloggs:** Logged Out, White Glove, Last Seen: Never.
- Jill Bloggs:** Logged Out, White Glove, Last Seen: Never.
- Bill Gates:** Logged Out, White Glove, Last Seen: Never.
- Tony Gardner:** Logged Out, No skills assigned, Last Seen: Never.

Data import wizard (when not using an API to import data):



The screenshot shows the 'Import wizard' interface for 'CSV Import'. The user is currently in 'Step 2 - Map fields'. The interface is divided into four columns, each representing a field from the CSV file to be mapped to a system field.

CSV Field	System Field	Mapping
first_name	first_name	first_name
last_name	last_name	last_name
contact_number_1	contact_number_1	contact_number_1
contact_number_2	contact_number_2	contact_number_2
contact_number_3	contact_number_3	contact_number_3
last_donation_amount	last_donation_amount	last_donation_amount
last_donation_date	last_donation_date	last_donation_date
skill	skill	Unmapped

Below the mapping area, there is a 'Select Lead Type' dropdown menu set to 'White Glove' and a 'Next' button.



Sample cumulative campaign performance report

Sample Performing Arts Client 1 2014-2015
Telefunding Cumulative Report

8/3/2015
8:45:55AM

Lead Sub-Type	Gross Leads		Bad Numbers		SOL Outs		Resolution Rate	Response Rates		Donors	GRTs	Avg GRT	Total Pledged	Week of 7/27	Ren Inc	LY Amount	Credit Card Pledges			Exceptions		List No	
	\$	#	\$	#	\$	#	%	On Gross	On Closed								\$	#	%	\$	#	\$	#
14 ACC STB	\$0	95	\$0	13	\$0	68	23%	6%	32%	6	6	\$121	\$725	\$0	0%	\$0	2	\$75	10%	\$0	9	\$0	4
15 ACC STB	\$0	1965	\$0	83	\$0	1705	11%	3%	26%	54	57	\$129	\$6,945	\$0	0%	\$0	36	\$5,535	90%	\$0	120	\$0	32
15 STB Blues	\$0	643	\$0	64	\$0	371	36%	10%	30%	63	63	\$115	\$7,265	\$0	0%	\$0	36	\$4,880	67%	\$0	71	\$0	74
15 STB Bull Durham	\$255	1361	\$0	154	\$105	641	41%	7%	18%	76	86	\$150	\$11,585	\$0	0%	\$0	61	\$9,615	83%	\$150	250	\$0	89
15 STB CA Lyons	\$0	163	\$0	25	\$0	54	67%	17%	30%	28	28	\$79	\$2,225	\$0	0%	\$0	11	\$900	36%	\$0	65	\$0	0
15 STB Edward Ford	\$0	308	\$0	28	\$0	167	40%	5%	12%	14	14	\$151	\$2,120	\$0	0%	\$0	7	\$1,650	78%	\$0	83	\$0	16
15 STB James	\$0	289	\$0	19	\$0	157	43%	10%	26%	29	29	\$92	\$2,655	\$0	0%	\$0	14	\$1,530	58%	\$0	80	\$0	4
15 STB Native Guard	\$10	172	\$0	17	\$10	105	43%	11%	28%	19	20	\$178	\$3,390	\$0	0%	\$0	11	\$2,530	75%	\$0	36	\$0	11
15 STB Steel Pipes	\$300	794	\$0	90	\$250	439	43%	8%	21%	64	65	\$146	\$9,335	\$0	0%	\$0	48	\$7,870	84%	\$50	166	\$0	72
15 STB Truck	\$0	1456	\$0	350	\$0	741	48%	11%	24%	153	157	\$191	\$29,230	\$0	0%	\$0	108	\$24,945	85%	\$0	330	\$0	139
Bridges 13 or 14	\$0	2695	\$0	132	\$0	2378	8%	2%	21%	44	47	\$232	\$10,195	\$0	0%	\$0	29	\$9,470	93%	\$0	98	\$0	68
FCS 13 or 14	\$0	172	\$0	37	\$0	81	42%	3%	9%	5	6	\$140	\$725	\$0	0%	\$0	4	\$375	52%	\$0	28	\$0	24
Lapsed 2-5	\$166,830	4366	\$19,878	716	\$114,584	3033	20%	3%	20%	152	159	\$108	\$16,368	\$0	0%	\$0	57	\$8,998	46%	\$25,811	448	\$5,042	137
MSTB	\$22,131	643	\$247	52	\$8,861	335	51%	15%	31%	96	106	\$157	\$15,025	\$0	0%	\$0	67	\$10,910	73%	\$5,932	146	\$1,427	60
MSTB 2013	\$0	984	\$0	353	\$0	622	27%	3%	14%	30	30	\$83	\$2,485	\$0	0%	\$0	10	\$760	31%	\$0	123	\$0	66
MSTB 2014	\$0	1303	\$0	192	\$0	671	30%	4%	15%	41	45	\$136	\$5,575	\$0	0%	\$0	19	\$3,785	68%	\$0	180	\$0	50
STB 448-ss	\$3,292	648	\$609	111	\$1,536	264	64%	17%	30%	107	120	\$196	\$20,948	\$0	0%	\$0	81	\$17,173	82%	\$777	177	\$140	58

Planning and managing telephone campaigns properly can be chaotic. The ancient definition of Kaos is to make something out of nothing. Blueprint's Kaos has made Kaos out of chaos.

Blueprint's goal in creating Kaos was to create order and the ultimate productivity for your telephone campaigns, while managing your patron and donor experience at the highest level.

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