

## 2026 DonorConnect Roadshow Sessions

*Our session lineup continues to grow. Check back regularly for the latest updates and additions.*

Product	Presenter	Track	Session Title	Description/Key Takeaways
SE	Tim Loyola	Super User	Beyond the Inbox: Email Strategies for Better Engagement	<p>Email remains one of the most effective ways to strengthen engagement, build trust, and stay connected with your constituents.</p> <p>In this session, we will explore the best email practices within StudioEnterprise, from managing email addresses and improving deliverability to sending impactful communications, receipts, and marketing campaigns. Walk away with practical strategies and a clearer understanding of how to use email more effectively to support stronger constituent relationships and communication outcomes.</p> <p>Key Takeaways</p> <ul style="list-style-type: none"> <li>• Gain confidence in configuring, managing, and maintaining email addresses within StudioEnterprise.</li> <li>• Understand the tools and capabilities available for sending emails, receipts, and constituent communications directly from StudioEnterprise.</li> <li>• Learn practical strategies and features that improve email effectiveness, engagement, and overall communication workflows.</li> </ul>
SE	Tim Loyola	Super User	From Data to Decisions: Smarter Reporting Strategies in StudioEnterprise	<p>Reliable reporting is essential for understanding donor engagement, measuring impact, and making confident ministry and fundraising decisions.</p> <p>In this session, we will explore the three primary reporting methods available within StudioEnterprise, Advanced Find, Segmentation, and core reports, helping you understand when and how to use each approach based on your goals. We will also look ahead at the future of reporting with Power BI and how enhanced visibility into your data can support more informed, strategic decision-making across your organization.</p> <p>Key Takeaways</p> <ul style="list-style-type: none"> <li>• Learn how to choose the right reporting method in StudioEnterprise based on your operational, fundraising, and engagement goals.</li> <li>• Discover practical ways to improve reporting efficiency and better leverage DonorDirect support and expertise.</li> </ul>

				<ul style="list-style-type: none"> <li>Gain insight into the future of reporting with Power BI and how expanded data visibility can strengthen planning, analysis, and decision-making.</li> </ul>
SE	Rich Lodi	Business User	Getting Related Gifts Right: Clarity, Accuracy, and Donor Stewardship	<p>Managing related gifts and soft credits is essential for maintaining donor trust, ensuring proper recognition, and strengthening reporting accuracy. Yet many organizations face uncertainty around where gifts should be recorded, how acknowledgements should be handled, and how to effectively track related donor activity.</p> <p>In this session, we will walk through common related gift scenarios and provide practical guidance to help your team manage these situations with greater clarity, consistency, and confidence.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>Learn best practices for accurately recording related gifts and soft credits to support cleaner donor records and reporting.</li> <li>Understand how to professionally manage acknowledgements and recognition for related donors to strengthen stewardship and donor relationships.</li> <li>Gain practical insight into identifying, tracking, and reporting on related donor activity within the system.</li> </ul>
SE	Nicole Murry	Business User	Smarter Segmentation: Reaching the Right People with Confidence	<p>Effective outreach starts with reaching the right audience at the right time. Whether you are building campaigns, strengthening donor engagement, or improving constituent communication, reliable segmentation is essential for creating meaningful connections and driving better outcomes.</p> <p>In this session, we will explore how segmentation works within the system, break down the key components of a successful segmentation job, and share practical best practices for building accurate, trustworthy lists that support more effective marketing and outreach efforts.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>Learn how segmentation helps identify and engage the right audiences for targeted marketing and communication efforts.</li> <li>Understand the core components that work together to create accurate, meaningful, and actionable lists.</li> <li>Apply best practices for building clear segmentation criteria that improve list reliability, campaign confidence, and outreach effectiveness.</li> </ul>

SE	Tim Loyola	Business User	Transaction Entry Made Clear: A Smarter Processing Workflow in StudioEnterprise	<p>Efficient transaction processing is essential for maintaining accurate records, improving operational workflows, and reducing time spent on manual tasks. While many StudioEnterprise users understand individual parts of the process, it can be difficult to see how batches, deposits, pay types, and transaction entries all work together.</p> <p>In this session, we will connect the full transaction workflow from start to finish, while also uncovering practical tips, lesser-known features, and best practices that can help your team work faster, more accurately, and with greater confidence.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Gain a clearer understanding of how batches, deposits, and transaction workflows work together within StudioEnterprise.</li> <li>• Learn how to effectively use pay types to improve batching accuracy, reconciliation, and deposit management.</li> <li>• Discover best practices, time-saving features, and practical techniques that make transaction entry more efficient and reliable.</li> </ul>
SE	Rich Lodi	Super User	Beyond the Basics: Power User Strategies for a Smarter StudioEnterprise Experience	<p>After go-live, many ministries naturally focus on stabilizing operations and returning to day-to-day work. But often, that means only a fraction of StudioEnterprise's full capabilities are being used. As a Power User, you have the opportunity to move beyond basic functionality and shape the system to better support your ministry's unique workflows, staff efficiency, and operational goals.</p> <p>In this session, we will explore practical ways to customize and optimize StudioEnterprise so your team can work more effectively, reduce manual effort, and get greater value from the platform every day.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Learn how to customize and organize grids to improve visibility, usability, and day-to-day efficiency.</li> <li>• Discover ways to re-order activities and workflows to better align StudioEnterprise with your ministry's operational needs.</li> <li>• Simplify and standardize data entry using default values to improve consistency, accuracy, and staff productivity.</li> </ul>

SE	Rich Lodi	Super User	Beyond Standard Limits: Creative Solutions with StudioEnterprise	<p>When business processes become overly complex, or time-consuming, or when data tracking becomes dependent on spreadsheets, it can slow down your team and limit visibility into important donor and operational information. Many organizations reach a point where they need StudioEnterprise to do more, but are not always aware of the tools, configurations, and creative approaches available to extend its capabilities.</p> <p>In this session, we will share real-world examples of custom solutions DonorDirect has implemented to help organizations simplify complex processes, improve efficiency, and better align StudioEnterprise with their unique operational needs. You will walk away with practical ideas and creative perspectives for solving business challenges more strategically.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Discover tools, enhancements, and configuration approaches that can extend and strengthen StudioEnterprise functionality.</li> <li>• Explore real-world examples for solving operational challenges using creative StudioEnterprise solutions.</li> <li>• Learn how to identify process gaps and think more strategically about improving efficiency, visibility, and business processes.</li> </ul>
SE	Nicole Murry	Business User	Smarter Campaign Tracking: Using Source Codes for Clearer Marketing Insight	<p>Effective marketing decisions depend on accurate data, reliable reporting, and a clear understanding of what is driving engagement and results. Source Codes play a critical role in helping organizations track campaigns, measure performance, and better understand the financial impact of their marketing efforts.</p> <p>In this session, we will explore how Source Codes function within StudioEnterprise, share best practices for structuring and maintaining them, and demonstrate how thoughtful Source Code management can improve reporting clarity, campaign analysis, and strategic decision-making.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Understand how Source Codes help identify campaigns, track engagement, and measure marketing performance more effectively.</li> <li>• Learn best practices for creating and maintaining Source Codes that support clean, consistent, and reliable reporting.</li> <li>• Discover how well-managed Source Codes provide clearer visibility into campaign effectiveness and the financial impact of marketing efforts.</li> </ul>

SE	Michael Brewer	Technical User	Custom Actions Demystified: Expanding What's Possible in StudioEnterprise	<p>As operational needs grow more complex, organizations often need greater flexibility to streamline processes, automate tasks, and support unique business requirements. Custom Actions in StudioEnterprise provide powerful ways to extend functionality and solve operational challenges more efficiently.</p> <p>In this session, we will provide a high-level introduction to Custom Actions, helping technical users understand what they are, where they add value, and how they can support smarter business processes across your organization. Through practical examples and real-world use cases, attendees will gain the confidence and foundational understanding needed before exploring deeper development opportunities.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Understand what Custom Actions are and when they are most effective for solving operational or technical challenges.</li> <li>• Explore practical, real-world examples of how Custom Actions are used within StudioEnterprise environments.</li> <li>• Learn how to think strategically about Custom Actions at a high level before designing or building a solution.</li> </ul>
SE	Nicole Murry	Product	Introducing the New StudioEnterprise Experience: Navigating the Updated UI with Confidence	<p>Technology should feel intuitive, approachable, and easy to navigate, especially for the teams who rely on it every day. StudioEnterprise Version 26 introduces a fully redesigned User Interface that modernizes the look and feel of the platform while preserving the functionality your ministry already depends on.</p> <p>In this session, we will walk through the updated experience, highlight key navigation changes, and help users feel comfortable and confident as the new interface rolls out across ministries. Whether your organization has already adopted the redesign or is preparing for the transition, this session will help ensure a smoother and more confident user experience.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Become familiar with the updated look and feel of the new StudioEnterprise User Interface.</li> <li>• Understand key navigation updates and how to move confidently through the redesigned experience.</li> <li>• Build comfort and confidence with the new interface so your team feels prepared, supported, and ready for the transition.</li> </ul>

ASO	Ben Smith	Technical User	Beyond the Style Tab: Advanced StudioOnline Customization Techniques	<p>Your website plays a critical role in how constituents experience, engage with, and connect to your mission online. While the built-in Style tab in Advanced StudioOnline provides a strong foundation, many organizations want greater flexibility to create more polished, interactive, and modern digital experiences.</p> <p>In this session, we'll explore how to extend StudioOnline using custom stylesheets, override classes, and JavaScript-powered enhancements to gain deeper control over layout, branding, and user interactions. Attendees will leave with practical techniques, reusable patterns, and a roadmap for building more scalable, dynamic, and engaging web experiences.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Learn how to use custom style sheets and override classes to create more precise, flexible, and polished website designs beyond the built-in Style tab.</li> <li>• Discover how JavaScript and the Includes Wizard can add richer interactions, enhanced functionality, and more dynamic user experiences.</li> <li>• Build a reusable toolkit of advanced CSS, HTML, and JavaScript techniques that can scale across projects and support more consistent, modern web development practices.</li> </ul>
ASO	Ben Smith & Jason Higley	Super User	Custom ASO Solutions: Creating Smarter, More Engaging Donor Experiences	<p>Every organization has unique operational needs, donor engagement goals, and online giving experiences that standard functionality alone may not fully support. Advanced StudioOnline offers powerful opportunities to extend and customize the donor experience through thoughtful use of custom CSS, and JavaScript enhancements.</p> <p>In this session, we will highlight real-world examples of how organizations have used custom ASO solutions to simplify processes, improve usability, strengthen donor engagement, and solve common operational challenges. Attendees will gain practical ideas for creating more impactful digital experiences while maintaining scalability, consistency, and long-term supportability.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>• Learn how custom JavaScript and CSS can extend Advanced StudioOnline functionality and create more flexible, engaging donor experiences.</li> <li>• Explore real-world examples of custom ASO solutions implemented by DonorDirect to solve operational and fundraising challenges.</li> </ul>

				<ul style="list-style-type: none"> <li>Discover practical customization techniques, including dynamic Giving Array behavior, automated date handling, enhanced form fields, and improved donor interaction workflows.</li> </ul>
ASO	Jason Higley	Business User	Optimizing Online Giving: Building Better ASO Giving Experiences	<p>A donor's online giving experience can directly impact engagement, conversion rates, and long-term generosity. Organizations today need giving experiences that are intuitive, branded, mobile-friendly, and aligned with the way donors prefer to give.</p> <p>In this session, we'll explore the different giving page options available within Advanced StudioOnline and how to select the right approach based on your organization's goals, campaigns, branding, and donor engagement strategy. Attendees will gain practical guidance on creating streamlined, donor-friendly giving experiences that improve conversion, support recurring giving, and strengthen online fundraising outcomes.</p> <p><b>Key Takeaways</b></p> <ul style="list-style-type: none"> <li>Learn how to choose and customize the right ASO giving page experience to align with your organization's goals, campaigns, branding, and donor engagement strategy.</li> <li>Discover best practices for creating seamless, donor-friendly online giving experiences that improve conversion, strengthen recurring giving participation, and simplify the donation process.</li> <li>Gain practical implementation insights around real-world optimization strategies that help increase online giving engagement and fundraising effectiveness.</li> </ul>

All	Rich Lodi & Tim Loyola	Services	Extending Your Team: How Staff Augmentation Can Accelerate Ministry Impact	<p>Many ministries are being asked to do more with limited staff, growing operational demands, and increasing technology needs. Staff Augmentation offers a flexible, cost-effective way to expand your team’s capabilities by bringing experienced subject matter experts alongside your staff to support critical operational, technical, and digital initiatives.</p> <p>In this session, we will explore how organizations can use Staff Augmentation services across StudioEnterprise, Advanced StudioOnline, and web services to improve efficiency, strengthen internal capacity, and accelerate mission-focused outcomes. Attendees will gain practical insight into how this model can help ministries move forward faster without the challenges of adding full-time staff.</p> <p>Key Takeaways</p> <ul style="list-style-type: none"> <li>• Understand what Staff Augmentation is, how it works, and how it can provide immediate access to specialized expertise and support.</li> <li>• Explore the diverse ways ministries are using Staff Augmentation services across SE, ASO, and web initiatives to improve operations, efficiency, and digital engagement.</li> <li>• Learn how Staff Augmentation can deliver strong operational value and measurable impact while remaining a flexible and cost-effective resource model.</li> </ul>
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ASO	Stiles Watson	Super Users	Protect the Giving Experience: Using ASO Velocity Limits to Reduce Fraud and Disruption	<p>When online giving experiences are interrupted by fraudulent activity, automated attacks, or repeated failed transactions, donor trust and ministry momentum can suffer. Advanced StudioOnline (ASO) Velocity Limits are designed to help protect your donation experience behind the scenes—automatically identifying suspicious activity patterns and blocking abusive behavior before it impacts legitimate supporters.</p> <p>In this session, you will see how ASO Velocity Limits work in real time, how rules can be configured to match your organization's needs, and how administrators can monitor activity and review blocked attempts with confidence. Learn how to strengthen donation security while preserving a seamless and trusted experience for every donor.</p> <p><b>Key Takeaways</b>          Learn how Velocity Limits help protect your online giving experience from fraud, card testing, and automated abuse.          Understand how ASO tracks activity patterns and automatically responds to suspicious behavior in real time.          Gain visibility into how administrators can review blocked activity, monitor trends, and maintain donor confidence without adding friction to giving.</p>
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Please note: Sessions and presenters are subject to change.