



# SWITCHBACK CARAVAN

Membership Management for  
Active Organizations



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- Trailhead
- Summit
- 1 Point of Interest
- Contact Management
- Event Management
- Email Campaigns
- Fundraising & Dues
- Advanced Search
- Data Export

## CARAVAN POINTS OF INTEREST

- 1** Organize a Growing & Active Database of Contacts
  - Record all of the contact information for the people your organization works with, by individual, organization or member.
  - Schedule and track your interactions, such as meetings, phone calls and email. Track member involvement, such as contributions, committee membership and event attendance.
  - Organize your contacts into groups, or use free-form tagging, for painless reporting, tracking and communication.
- 2** Schedule & Manage a Full Calendar of Events
  - Promote each of your events with a custom web page including event information and location mapping.
  - Set varying fees, such as full- or half-day rates, as well as discounts for different membership levels or early registration.
  - Provide convenient online registration and payment.

- 3** Effortlessly Send Email Blasts & Track Success
  - Easily send mass emails to saved mailing lists, or by creating custom lists for contacts that meet any number of criteria.
  - Save time by creating and reusing email templates for regular communications, such as renewal reminders and thank-yous.
  - Track the real-time success of each email blast with detailed reports on opens, click-throughs, and bounces.
- 4** Make Fund-raising & Dues Collection a Breeze
  - Allow your members to easily sign-up, renew and pay dues online. Automated reminders help keep accounts up-to-date.
  - Raise funds with customizable campaign pages. Sell items and services or collect pledges toward a goal.
  - Accept credit card payments with no additional fees and send automated receipts.

- 5** Quickly Find What You Need with Powerful Search Capabilities
  - Easily build and run complex searches to get exactly the information you need. Save searches for even faster results.
  - Instantly perform batch actions and updates on just a few, or even thousands of records.
  - Extract custom data sets as CSV (comma separated values) files, which can then be imported into other software for reports or accounting.



### Control Your Website with Add-on Content Management

Extend your system to give you full control over your organization's website by adding on Trailhead, our basic content management system. Trailhead integrates fully with Caravan to provide additional web-based features for you and your members.

Learn more at [www.switchbackcms.com/trailhead](http://www.switchbackcms.com/trailhead).

## Your Trail Map to Member Management Success!

Ok, so that heading is pretty corny. But if you've made it this far, you're probably relatively interested in Caravan—and frankly, no snappy line can do what a simple phone call or face-to-face can. So give us a ring, drop us a line, whatever works for you:



[www.switchbackcms.com/caravan](http://www.switchbackcms.com/caravan)  
[caravan@switchbackcms.com](mailto:caravan@switchbackcms.com)  
734.864.1667 x300

We look forward to hearing from you and giving you a personal tour of Caravan.