### ROUNDTABLE Blackbaud Constituent Relationship Management

### April 2013



## Benefits

- Ease of use
  - Accessible from anywhere
  - Web-based
- Upgradable with future software releases
- Constituent 360-degree view
- Moves management
- Fundraising event management
- Donor research



# Key Fundraising Definitions

- **BBEC** Revenue—What a constituent donated
  - PAS Pledge/Payment Transactions
- **BBEC** Campaign—Why we are raising the money
  - PAS New concept to BSA
- BBEC Designation—Where the money is going, specifically for what purpose—drives GL
  - PAS Giving Category/Donor Group—drives GL
- **BBEC** Appeal—How we are asking for the contribution
  - PAS New concept to BSA



# **Key Fundraising Definitions**

- BBEC Constituents—Individuals, organizations, groups, and households
  - PAS Individuals and organizations
- BBEC Prospects—Individuals assigned a fundraiser and gift plan
  - PAS All individuals or organizations
- BBEC Site—The entity with which the constituent has a relationship
  - PAS Your council or the national office



# April Roundtable Objectives

- Expand CRM knowledge.
- Continue to learn CRM navigation.
- Review Fundraising function.
  - Naming Opportunities



### Blackbaud CRM<sup>™</sup> for Boy Scouts of America

### blackbaud





### Web dashboard

Create visual overviews of your data using charts, gauges and other nifty widgets, and organize these views using pages and folders.



### Mobilize

Browse your data on a mobile phone or other web-enabled handheld device.



### Utilities

Download utilities and add-ins to popular applications such as Microsoft Excel and Vista Sidebar, or view various reference documents. // Create a CRUD service object with th
// of the database containing the data.
var svc = new BLACKBAUD.nimbus.CrudServ:
// Get the Constituent's Constituent Gro
var dataList = svc.system.dataLists("9dl
// Parameters are optional. Only the pi
// Parameters are optional.

### Endpoints

Browse the API's various endpoints and view their documentation.



### Smart Client

Launch the Blackbaud CRM ClickOnce application (for backwards-compatibility).



Use ScoutNET user name and password. Put netbsa\ before your user name.

<del>(</del>)

| Windows Security<br>Connecting to crm.scouting.org.                |           |
|--|-----------|
| User name<br>Password<br>Domain: NETBSA<br>Remember my credentials |           |
| Insert a smart card  |           |
|  | OK Cancel |
|  |           |

х



 John D. Kuehn - Major giving prospect
 John D. Kuehn
 Research Request #7

Campaign: Local Council

Fundraising Hierarchy

Mapping

Campaign:

We will be previewing some of the functions in Fundraising during this month.



- R Trucks Unlimited
- NETBSA\jhendrix -Application User
- NETBSA\ggranum -Application User
- Decapitalization fund
   FEP benchmarking comparison
- Fundraising hierarchy progress
- Fundraising hierarchy summary
- Fundraising purpose profile
- Fundraising purpose revenue
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Items with stars will be available for key people. We will explore naming opportunities.

#### Blackbaud CRM™

#### Welcome, John Kuehn - Search All features

Add

#### Home - Constituents - Ma

#### Recent searches

- Committee revenue activity
- Fundraising purpose profile
- Application user search
- A Constituent search
- Workflow task search

#### Recently accessed

- Naming Opportunity Facilities
- 🎍 John D. Kuehn
- 🔏 John D. Kuehn Wealth and Ratings
- METBSA\amcallis -Application User
- The second secon and Giving
- I Fundraising Purpose Profile Report - Abraham Lincoln Council
- METBSA\louislai -Application User
- Real Trucks Unlimited
- METBSA\ihendrix -Application User
- 🏂 NETBSA\ggranum -Application User

| Naming Op              | portunity Facilities |         |       |       | ow         |              |
|------------------------|----------------------|---------|-------|-------|------------|--------------|
| Naming opportunity fac | cilities             |         |       |       |            | 🔂 Add 🥖 E    |
| Name                   | Address              | City    | State | ZIP   | Area       | Unit         |
| Camp NSJ               | 456 Boy Scout Lane   | Promise | ТХ    | 78855 |            | $\smile$     |
| Camp NSJ               | 456 Boy Scout Lane   | Promise | ТХ    | 78855 | Sub Camp 1 | Troop Site 1 |
| Camp NSJ               | 456 Boy Scout Lane   | Promise | ТХ    | 78855 | Sub Camp 2 |              |
| Camp NSJ               | 456 Boy Scout Lane   | Promise | TX    | 78855 | Sub Camp 2 | Troop Site 2 |

This is where you place the location for items you might want to build during a capital campaign. You attach opportunities to these facilities.

| DIa | alth | aud | CD | B AT |
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#### Home Constituents Marketing and Communications Revenue Events Memberships Prospects Foundations Fundraising Web Analysis Administration Workflow

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- Committee revenue activity
- Fundraising purpose profile
- Application user search
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- Fundraising Purpose Profile Report - Abrahan Lincoln Council
- NETBSA\louislai -Application User
- 📲 Trucks Unlimited
- METBSA\jhendrix -
- NETBSA\ggranum -Application User

| ming opportunity ra | cilities           |                            |          |                    |                          | 🕀 Add   |
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| ame                 | Address            | City                       | State    | ZIP                | Area                     | Unit    |
| mp NSJ              | 456 Boy Scout Lane | Promise                    | TX       | 78855              |                          |         |
| mp NSJ<br>mp NSJ    | 456 Boy<br>456 Boy | ng opportunity facility    |          |                    | Sub Camp 1<br>Sub Camp 2 | Troop S |
|                     | General<br>Name:   | Camp NSJ                   | Address  | United States      |                          |         |
|                     | Area:<br>Unit:     | Sub Camp 2<br>Troop Site 2 | Address: | 456 Boy Scout Lane |                          |         |
|                     |                    |                            | City:    | Promise            |                          |         |
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|                     |                    |                            | ZIP:     | 78855              |                          |         |

### Demonstration of adding another facility.

| Blackbaud CBM™               |                           |                                |   |                                  | Welcome. John Kuehn 🗸          | Search All features | DAA G        |
|------------------------------|---------------------------|--------------------------------|---|----------------------------------|--------------------------------|---------------------|--------------|
| Home • Constituents • Market | ting and Communications • | Revenue • Events • Memberships | <ul> <li>Prospects - Foundat</li> </ul> | tious • Fundraising • Neb • Anal | vsis • Administration • Workfl | ow •                | /////        |
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| A Constituent search         | Camp NSJ                  | 456 Boy Scout Lane             | Promise                                 | ТХ                               | 78855                          |                     |              |
| R Workflow task search       | Camp NSJ                  | 456 Boy Scout Lane             | Promise                                 | TX                               | 78855                          | Sub Camp 1          | Troop Site 1 |
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| Naming Opportunity           |                           |                                |   |                                  |                                |                     |              |

- New facility has been added. We
- then head back to Fundraising.

🏂 NETBSA\louislai -Application User Real Trucks Unlimited

🧸 Fundraising Purpose Profile Report - Abraham

Lincoln Council

Facilities 🎍 John D. Kuehn 🧃 John D. Kuehn - Wealth and Ratings METBSA\amcallis -Application User The second secon and Giving

- 🏂 NETBSA\jhendrix -Application User
- 🏂 NETBSA\ggranum -Application User



- METBSA\ggranum -Application User
- Fundraising hierarchy summary Fundraising purpose profile
  - Fundraising purpose revenue
  - Naming opportunity availability
  - Naming opportunity recognition
  - Solicitor revenue
  - VSE survey

| Blackbaud CRM™   | Welcome, John Kuehn - 👘 Search All features                      | Add I |
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| Home • Constituents • Marketing and Communications •   |  |       |
| Recent searches  | Add a naming opportunity   |       |
| profile     Fundraising       Application user search     Purpose search       Constituent search     Add a purpose       Workflow task search     Campaign search                                   | General     Location       Name:     Facility:                   |       |
| Recently accessed     Image: Campaign Search       Naming Opportunity     Image: Campaign hierarchy       Facilities     Naming opportunity  | Description:    Type:    Quantity:      1   Fundraising          |       |
| John D. Kuehn<br>John D. Kuehn - Wealth<br>and Ratings<br>NETBSA\amcallis -  | Minimum gift amount: \$0.00<br>Fundraising purpose:<br>Campaign: |       |
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| Application User  Committee Fundraising and Giving  Fundraising Purpose Profile Report - Abraham Lincoln Council  NETBSA\louislai - Application Licer  | Comments:   | Fill in the 4 items on the left and then click the spyglass to search for your facility. |           |
| <ul> <li>Designation progress</li> <li>Decapitalization fund</li> <li>NETBSA\jhendrix -<br/>Application User</li> <li>NETBSA\ggranum -<br/>Application User</li> <li>FEP benchmarking com</li> <li>Fundraising hierarchy p</li> <li>Fundraising hierarchy s</li> <li>Fundraising purpose pr</li> <li>Fundraising purpose re</li> <li>Naming opportunity availate</li> <li>Naming opportunity recogn</li> <li>Solicitor revenue</li> <li>VSE survey</li> </ul>  | Help<br>ility   | Save Cancel  |           |

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| Blackbaud CRM™                        |                              |                      |                 |                  | Welcome, John Kuehn | Search All features | P Add new • |
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| Recently accessed                     | 🙀 Campaign hierarchy sea     | Туре:                | Capital Gift    | ▼ Site:          |                     | <b>▼</b> <i>P</i>   |             |
| Facilities                            |                              | Quantity:            | 1               | Fundraising      |                     |                     |             |
| 🎍 John D. Kuehn                       | Naming opportunities         | Minimum gift amount: | \$1,000,000.00  |                  |                     |                     |             |
| 🥤 John D. Kuehn - Wealth              | Naming opportunity se        |                      |                 | Fundraising purp | pose:               | Q                   |             |
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| Profile Report - Abraham              | Reports                      |                      |                 | for our c        | ontact.             |                     |             |
| Lincoln Council                       | Campaign recognition of      |                      |                 |                  |                     | <b>T</b>            |             |
| NETBSA\louislai -<br>Application User | Campaign summary             | Special handling:    |                 |                  |                     | _                   |             |
| R Trucks Unlimited                    | Decapitalization fund        |                      |                 |                  |                     | A                   |             |
| 🏂 NETBSA\jhendrix -                   | FEP benchmarking com         |                      |                 |                  |                     |                     |             |
| Application User                      | Fundraising hierarchy p      |                      |                 |                  |                     | ~                   |             |
| METBSA\ggranum -<br>Application User  | Fundraising hierarchy s      |                      |                 |                  |                     |                     |             |
|                                       | Fundraising purpose pr       | Help                 |                 |                  | Save                | Cancel              |             |
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| Blackbaud CRM"   |  |   | Welcome, John Kuehn 🕶 👘 Search All features            | Add new   |
|--|--|---|--|-----------|
| Blackbaud CRM<br>Home Constituents Marketing and C<br>Recent searches<br>Committee revenue<br>activity<br>Fundraising purpose<br>profile<br>Application user search<br>Constituent search<br>Workflow task search<br>Workflow task search<br>Workflow task search<br>Naming Opportunity<br>Facilities<br>John D. Kuehn<br>John D. Kuehn<br>John D. Kuehn<br>John D. Kuehn<br>Gommittee Fundraising<br>and Giving<br>Fundraising Purpose<br>Profile Report - Abraham<br>Lincoln Council<br>NETBSA\Jouislai -<br>Application User<br>Trucks Unlimited<br>NETBSA\Jouislai -<br>Application User<br>Trucks Unlimited<br>NETBSA\Jouislai -<br>Application User<br>NETBSA\Jouislai -<br>Application User<br>NETBSA\Jouislai -<br>Application User<br>NETBSA\Jouislai -<br>Application User | Communications Revenue Events Memberships   Fundraising   Purpose search   Add a purpose   Campaign search   Add a campaign   Add a campaign   Campaign hierar   Mating opporte   Naming opporte   Naming opporte   Add a naming op   Campaign search   Add a naming op   Campaign search   Add a naming op   Campaign search   Add a naming op   Conts   Campaign search   Campaign search   Add a naming op   Conts   Campaign search   Decapitalization   FEP benchmarkhi   Fundraising hierar   Fundraising hierar   Chick nickr   Chick aliasti   Chick aliasti </th <th>Prospects &lt; Foundations &lt; Fundralsing &lt; Web         Address:         City:         City:         State:         Image: State:         &lt;</th> <th>Welcome, John Kuehn   Analysis Administration Workflow</th> <th>r a<br/>ve</th> | Prospects < Foundations < Fundralsing < Web         Address:         City:         City:         State:         Image: State:         < | Welcome, John Kuehn   Analysis Administration Workflow | r a<br>ve |

| Blackbaud CRM <sup>™</sup>  |  |   |   |   | Welcome, John Kuehn                          | Search All features | P Add new • |
|---|--|---|---|---|--|---------------------|-------------|
| Home - Constituents - Marketing   |  |   |   |   |  |                     |             |
| Recent searches       Image: Committee revenue activity         Image: Committee revenue activity       Image: Committee revenue activity         Image: Fundraising purpose profile       Image: Committee revenue activity         Image: Application user search       Image: Committee revenue activity         Image: Committee revenue activity       Image: Committee revenue activity         Image: Committee revenue activity       Image: Committee revenue activity         Image: Committee revenue activity       Image: Committee revenue activity         Image: Committee revenue activities       Image: Committee revenue activities         Image: Committee revenue activities       Image: Committee revenue activities         Image: Committee revenue activities       Image: Committee revenue activities | Fundraising     Fundraising     Fundraising     Add a purpose     Campaign search     Add a campaign     Campaign hierarchy sea  | Id a naming opportuni<br>General<br>Name:<br>Description:<br>Type:<br>Quantity: | ty Dining Hall Seating for 600 Capital Gift   | Location<br>Facility:<br>Contact:<br>Site:<br>Fundraising | Camp NSJ<br>John D. Kuehn<br>Abraham Lincoln |                     |             |
| <ul> <li>John D. Kuehn</li> <li>John D. Kuehn - Wealth<br/>and Ratings</li> <li>NETBSA\amcallis -<br/>Application User</li> <li>Committee Fundraising<br/>and Casing</li> </ul>   | Naming opportunities   | Minimum gift amount:  | \$1,000,000.00                                | Fundraising purpo<br>Campaign:                            | JSE:   |                     |             |
| <ul> <li>Fundraising Purpose</li> <li>Profile Report - Abraham</li> <li>Lincoln Council</li> <li>NETBSA\louislai -<br/>Application User</li> <li>Trucks Unlimited</li> <li>NETBSA\jhendrix -</li> </ul>   | Reports Campaign recognition of Campaign summary Designation progress Decapitalization fund FEP benchmarking com   | Special handling:   | Select a site<br>The site will<br>council whe | e and a<br>default<br>n active                            | purpose.<br>t to your<br>e.                  | ~                   |             |
| Application User<br>NETBSA\ggranum -<br>Application User  | <ul> <li>Fundraising hierarchy p</li> <li>Fundraising hierarchy s</li> <li>Fundraising purpose pr</li> <li>Fundraising purpose re</li> <li>Naming opportunity availab</li> <li>Naming opportunity recogn</li> <li>Solicitor revenue</li> <li>VSE survey</li> </ul> | Help  |   |   | Save   | ▼ Cancel            |             |

| Blackbaud CRM*                              |                              |  |                    |                   |                        | Welcome | , John Kuehn | • Search All features |   | 2 | Add new 🔹 |
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| Committee revenue                           | 💧 👃 Fundraising 🛛            | dd a naming oppor  | tunity<br>e Search |                   |                        |         |              |                       |   |   |           |
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| profile                                     | Fundraising                  |  |                    |                   |                        |         |              |                       |   |   |           |
| Application user search                     | Purpose search               | Name:  |                    |                   | Туре:                  |         | *            | Search                |   |   |           |
| Constituent search                          | 👃 Add a purpose              | Lookup ID:   |                    |                   | Category:              |         | ~            | Clear                 |   |   |           |
| Workflow task search                        | 🚛 Campaign search            | Cite   |                    | × 0               |                        |         |              |                       |   |   |           |
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| Naming Opportunity                          | 🙀 Campaign hierarchy sea     | Results (More tha  | n 100 records fo   | und; only the fir | st 100 rows are shown) |         |              | 🔂 Add                 |   |   |           |
| Facilities                                  | Naming opportunities         | Name   | Туре 🔺             | Category          | Lookup ID              | Site    | Public name  |                       |   |   |           |
| John D. Kuehn                               | Namina appartunitu sa        | Art Prints   | Capital            | PHLMT             | Art Prints             |         |              | <b>^</b>              |   |   |           |
| John D. Kuehn - Wealth<br>and Patinos       | Add a paming opportunity set | Bartle Fan Project   | Capital            | ARROW             | Bartle Fan Project     |         |              | E                     |   |   |           |
| Ally NETDS Allopseallie                     |                              | Bartle Scout Res   | Capital            | ARROW             | Bartle Scout Res       |         |              | _                     |   |   |           |
| Application User                            |                              | Board  | Capital            | ARROW             | Board                  |         |              | - 1. 199              |   |   |           |
| Committee Fundraising                       |                              | Cleveland  | Capital            | PHLMT             | Cleveland              |         |              |                       |   |   |           |
| and Giving                                  |                              | Family   | Capital            | PHLMT             | Family                 |         |              | _                     |   |   |           |
| 🕴 Fundraising Purpose                       | Reports                      | Abraham Lincol   | Capital            | ARROW             | Foundations            |         |              |                       |   |   |           |
| Profile Report - Abraham<br>Lincoln Council | Campaign recognition (       | Alumpi Giving  | Council            |                   | 144<br>AG              |         |              |                       |   |   |           |
| NFTBSA\louislai -                           | Campaign summary             | Buckeye Council  | Council            |                   | 436 L dia              |         |              | arch and              |   |   |           |
| Application User                            | Designation progress         | Cherokee Area  | Council            |                   | 556                    | a biai  | IK 26        | aich anu              |   |   |           |
| 🕼 Trucks Unlimited                          | Decapitalization fund        | Denver Area Co   | Council            |                   | 61 just                | picked  | a pu         | irpose that           | t |   |           |
| NETBSA\jhendrix -                           | FEP benchmarking com         | AGC  | Department         | BSANC             | AGC MOS                |         | 4 '          | •                     |   |   |           |
| Application User                            | E Fundraising hierarchy p    | Alumni Relations   | Department         | BSANC             | Alum Was               |         | J.           |                       |   |   |           |
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|   | 🗐 Fundraising purpose re     | 🕜 Help   |                    |                   |                        |         | Select       | Cancel                |   |   |           |
|   | Naming opportunity availa    | bility   |                    |                   |                        |         |              |                       |   |   |           |
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| Blackbaud CRM <sup>™</sup>                      |                            |                        |                 |       |                   | Welcome, John Kuehn          | Search All features | P Add new • |
|---|----------------------------|------------------------|-----------------|-------|-------------------|------------------------------|---------------------|-------------|
|   |                            |                        |                 |       |                   |                              |                     |             |
| Recent searches                                 |                            |                        |                 |       |                   |                              |                     |             |
| Committee revenue                               | <b>J</b> Fundraising       | ld a naming opportun   | ity             |       |                   |                              |                     |             |
| Fundraising purpose<br>profile                  | Fundraising                | General                |                 |       | Location          |                              |                     |             |
| Application user search                         | 🔥 Purpose search           |                        |                 |       |                   |                              |                     |             |
| Constituent search                              | 🌡 Add a purpose            | Name:                  | Dining Hall     |       | Facility:         | Camp NSJ                     | Q                   |             |
| Workflow task search                            | 🚂 Campaign search          | Description:           | Seating for 600 |       | Contact:          | John D. Kuehn                | Q                   |             |
| Recently accessed                               | Madd a campaign            | Туре:                  | Capital Gift    | ¥     | Site:             | Abraham Lincoln              | ✓ Ø                 |             |
| Naming Opportunity                              | 🥁 Campaign nierarchy sea   | Quantity:              |                 | 1     | Fundanisian       |                              |                     |             |
| John D. Kuehn                                   | Naming opportunities       | Minimum dift amount:   | \$1,000,000,0   | n     | Fundraising       |                              |                     |             |
| 👔 John D. Kuehn - Wealth                        | 🙀 Naming opportunity sea   | inininan girt anloant. | \$2,000,00010   | •     | Fundraising purpo | ose: Abraham Lincoln Council | P                   |             |
| and Ratings                                     | 📓 Add a naming opportur    |                        |                 |       | Campaign:         | 1                            | P                   |             |
| NETBSA\amcallis -<br>Application User           |                            |                        |                 |       |                   | 1                            |                     |             |
| Committee Fundraising                           |                            | Comments:              |                 |       |                   |                              | -                   |             |
| and Giving                                      |                            |                        |                 | Condu | ct a ca           | mpaign se                    | arch.               |             |
| Fundraising Purpose<br>Profile Report - Abraham | Reports                    |                        |                 |       |                   |                              |                     |             |
| Lincoln Council                                 | Campaign recognition c     |                        |                 |       |                   |                              | Ŧ                   |             |
| METBSA\louislai -                               | Campaign summary           | Special handling:      |                 |       |                   |                              |                     |             |
| Application User                                | Designation progress       |                        |                 |       |                   |                              | A                   |             |
| NETBSA\jhendrix -                               | EFP benchmarking com       |                        |                 |       |                   |                              |                     |             |
| Application User                                | Fundraising hierarchy p    |                        |                 |       |                   |                              | -                   |             |
| NETBSA\ggranum -                                | Fundraising hierarchy su   |                        |                 |       |                   |                              |                     |             |
| Application oser                                | E Fundraising purpose pr   | -                      |                 |       |                   |                              |                     |             |
|   | Fundraising purpose rev    | 🕑 Help                 |                 |       |                   | Save                         | Cancel              |             |
|   | Naming opportunity availab | ility                  |                 |       |                   |                              |                     |             |
|   | Naming opportunity recogr  | iition                 |                 |       |                   |                              |                     |             |
|   | Solicitor revenue          |                        |                 |       |                   |                              |                     |             |
|   |                            |                        |                 |       |                   |                              |                     |             |

| Blackbaud CRM™   |   |  |                        |                      |                | Welcome, <b>John</b> K | Kuehn 🕶 🔯 🕶 Search All f | eatures             | Add new 🔹    |
|--|---|--|------------------------|----------------------|----------------|------------------------|--------------------------|---------------------|--------------|
| Home - Constituents - Market   |   |  |                        |                      |                |                        |                          |                     |              |
| Recent searches  | Fundraising   | naming opportunity                                 |                        |                      |                |                        |                          | 1                   |              |
| <ul> <li>Fundraising purpose profile</li> <li>Application user search</li> <li>Constituent search</li> <li>Workflow task search</li> </ul> | Fundraising<br>Purpose search<br>Add a purpose<br>Campaign search<br>Add a campaign                           | Name:<br>Lookup ID:<br>Site:                       |                        | Type:<br>In          | clude inactive | ¥                      | Search<br>Clear          |                     |              |
| Recently accessed  | Campaign hierarchy sea  | Results (12 records found)                         |                        |                      |                |                        |                          |                     |              |
| Facilities<br>John D. Kuehn<br>🍘 John D. Kuehn - Wealth  | Naming opportunities  | Name<br>Abraham Lincoln Council<br>Buckeye Council | Type<br>Local<br>Local | Lookup<br>144<br>436 | ID             | Site                   |                          |                     |              |
| and Ratings<br>NETBSA\amcallis -<br>Application User   | 🔛 Add a naming opportur   | Cherokee Area Council<br>Comprehensive Campaign    | Local                  | 556<br>COMP          | Condu          | ict a b                | lank sear                | ch and p            | oick a       |
| Committee Fundraising and Giving   |   | Gerald R. Ford Council<br>Greater Alabama Council  | Local<br>Local         | 266<br>1             | campa          | aign. I<br>d with      | the site I               | campaig<br>selected | n<br>J. Note |
| Fundraising Purpose<br>Profile Report - Abraham<br>Lincoln Council   | Reports Campaign recognition of   | Heart of America Council<br>Local Council          | Local<br>Local         | 307<br>LC            | that ca        | ampaig                 | gns will no              | ot look lil         | ke this.     |
| NETBSA\louislai -<br>Application User  | Campaign summary Designation progress   | Narragansett Council<br>Patriots' Path Council     | Local<br>Local         | 546<br>358           |                |                        | - 1                      |                     |              |
| <ul> <li>Trucks Unlimited</li> <li>NETBSA\jhendrix -<br/>Application User</li> <li>NETRSA\opranum -</li> </ul>                             | <ul> <li>Decapitalization fund</li> <li>FEP benchmarking com</li> <li>Fundraising hierarchy p</li> </ul>      | Sam Houston Area Council                           | Local                  | 576                  |                |                        |                          |                     |              |
|  | <ul> <li>Fundraising hierarchy st</li> <li>Fundraising purpose pr</li> <li>Fundraising purpose res</li> </ul> | 🛛 Help   |                        |                      |                | Sele                   | ect Cancel               |                     |              |
|  | Naming opportunity availability     Naming opportunity recognitio     Solicitor revenue     VSE survey        |  |                        |                      |                |                        |                          |                     |              |
|  |   |  |                        |                      |                |                        |                          |                     |              |

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|--|---|--------------------------|-----------------------------------|--------------------|-----------------------------|-----------------------|-------------|
|  |   |                          | - Prospects - Foundations - Fundr |                    |                             |                       |             |
| Recent searches  | 2   |                          |                                   |                    |                             |                       |             |
| Committee revenue  | Fundraising Ad                                  | d a naming opportun      | ity                               |                    |                             | ⊠                     |             |
| Fundraising purpose<br>profile                                     | Fundraising                                     | General                  |                                   | Location           |                             |                       |             |
| Application user search  | 🔥 Purpose search                                | Name:                    | Dining Hall                       | Facility:          | Camp NSJ                    | Q                     |             |
| R Workflow task search   | 🚛 Campaign search                               | Description:             | Seating for 600                   | Contact:           | John D. Kuehn               | Q                     |             |
| Recently accessed  | Add a campaign                                  | Туре:                    | Capital Gift                      | Site:              | Abraham Lincoln             | <ul> <li>₽</li> </ul> |             |
| Naming Opportunity<br>Facilities                                   | M campaign nicrareny see                        | Quantity:                | 1                                 | Fundraising        |                             |                       |             |
| 🛔 John D. Kuehn  | Naming opportunities                            | Minimum gift amount:     | \$1,000,000.00                    |                    |                             |                       |             |
| Iohn D. Kuehn - Wealth<br>and Ratings                              | Add a naming opportunity se                     |                          |                                   | Fundraising purpos | se: Abraham Lincoln Council | 9                     |             |
| NETBSA\amcallis -     Application Liser                            |   |                          |                                   | Campaign:          | 144                         | Q                     |             |
| Committee Fundraising  |   | Comments:                |                                   |                    |                             | _                     |             |
| and Giving   |   | Dining hall to be heated | for winter use, It will seat 600. |                    |                             | ^                     |             |
| Fundraising Purpose<br>Profile Report - Abraham<br>Lincoln Council | Reports   |                          |                                   |                    |                             | Ŧ                     |             |
| NETBSA\louislai -<br>Application User                              | Campaign summary                                | Special handling:        |                                   |                    |                             | _                     |             |
| R Trucks Unlimited   | Decapitalization fund                           |                          |                                   |                    |                             | *                     |             |
| METBSA\jhendrix -  | FEP benchmarking com                            |                          |                                   |                    |                             |                       |             |
| Application Oser   | Fundraising hierarchy p                         |                          |                                   |                    |                             | T                     |             |
| Application User   | Fundraising hierarchy st Fundraising purpose pr |                          |                                   |                    |                             |                       |             |
|  | Fundraising purpose pr                          | Help                     |                                   |                    | Save                        | Cancel                |             |
|  | Naming opportunity availabi                     | lity                     |                                   |                    |                             |                       |             |
|  | Naming opportunity recogni                      | tion                     |                                   |                    |                             |                       |             |
|  | Solicitor revenue                               |                          |                                   |                    |                             |                       |             |
|  |   |                          |                                   |                    |                             |                       |             |

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|--|--|--|---|---|-----------------------------|---------------------|----------|-------------|
| Home - Constituents - Marketin   | ing and Communications • Revenue • Ev  | ents 🔹 Memberships 🝷 P                                 | Prospects - Foundations                       | ▼ Fundraising ▼ Web ▼ Analysis ▼                | Administration • Workflow • |                     |          |             |
| Tasks 🔅  | Naming Opportunit  | y: Dining Hall   |   |   |                             |                     |          |             |
| <ul> <li>✓ Edit naming opportunity</li> <li>➤ Delete naming opportunity</li> </ul>     | Name: Dining Hall Description: Seating for 600   | Status: Quantity: 1                                    | Active  | Location  |                             |                     |          |             |
| Recent searches  | Type:     Capital Gift       Contact:     John D. Kuehn       Purpose:     Abraham Lincoln Council | Remaining: 1<br>Minimum gift amount: \$<br>Campaign: A | L<br>51,000,000.00<br>Abraham Lincoln Council | Area: Sub Camp 2<br>Unit:<br>Facility: Camp NSJ |                             |                     |          |             |
| Fundraising purpose profile  | Site: Abraham Lincoln  |  |   |   |                             |                     |          |             |
| Application user search  | General Recognition History Prosp  | ects Documentation                                     |   |   |                             |                     |          |             |
| 🕅 Workflow task search   | Comments   |  |   |   |                             |                     |          |             |
| Recently accessed  | Dining hall to be heated for winter use,   | It will seat 600.                                      |   |   |                             |                     |          |             |
| Naming Opportunity:<br>Dining Hall   | Special handling   |  |   |   |                             |                     |          |             |
| Ward Cleaver - Major<br>giving prospect  |  |  |   |   |                             |                     |          |             |
| Fundraiser   |  |  | Nar   | ning Opportu                                    | nity view op                | ens                 |          |             |
| Naming Opportunity<br>Facilities   |  |  | onc   | e you click sa                                  | ave. We will                | now                 |          |             |
| <ul> <li>John D. Kuehn</li> <li>John D. Kuehn - Wealth</li> <li>and Ratings</li> </ul> |  |  | to a  | major giving                                    | prospect. V                 | Ve will             |          |             |
| METBSA\amcallis -<br>Application User  |  |  | jum   | p to Ward Cl                                    | eaver.                      |                     |          |             |
| Committee Fundraising<br>and Giving  |  |  |   |   |                             |                     |          |             |
| Fundraising Purpose<br>Profile Report - Abraham<br>Lincoln Council                     |  |  |   |   |                             |                     |          |             |
| NETBSA\louislai -<br>Application User  |  |  |   |   |                             |                     |          |             |

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|--|---------------------------|--|---|---|---|---|---|---|--------------------------|
| Home • Constituents • Marke  | ting and Communications 🔹 | Revenue • Events • Mem   | berships • Prospects •  | Foundations • Fundraising •   | Web 🕶 Analysis 👻 Aq   | dministration • Work  | low 🔹   |   |                          |
| Tasks 🔅  | 👗 Ward Clea               | ver - Major givin  | g prospect  |   |   |   |   | W   | /ard Cleaver - Major giv |
| <ul> <li>Edit prospect manager</li> <li>Replace prospect<br/>manager</li> <li>Request prospect<br/>manager</li> <li>Edit prospect status</li> </ul>  | R                         | 485 Grant Avenue<br>Mayfield, KS 66012<br>+1 (913) 441-1656<br>ward@harper.com | Prospect manager:<br>Tamera M. Butterfield<br>Start date:<br>3/1/2012 | Spouse:<br>June Cleaver<br>Household:<br>Mr Ward Cleaver and Mrs Ju<br>Prospect status: | ne Cleaver  |   |   |   |                          |
| View as 🔅  | Active constituencies: C  | CRM Name Major giving pros   | pect Event registrant C   | ommittee member   |   |   |   |   |                          |
| Sconstituent   |                           | ,  |   |   |   |   |   |   |                          |
| Committee member   | Plans Prospect Team       | Planned Gifts Funding I  | nterests Campaigns  | Prospect Manager History  |   |   |   |   |                          |
| Group member   | Plans                     |  |   |   |   |   | G Add - G   | Request major giving plan                             | Make active X Del        |
|  |                           |  |   |   |   |   |   |   |                          |
| More information   |                           |  |   |   |   | Site  | s: All sites  | The Include his                                       | storical plans 🛛 🚀 App   |
| Revenue and recognition     Communications   | Constituent               | Plan type  | Pla   | n name  | Start date  | Date a  | dded  | Sites   |                          |
|  | Ward Cleaver              | Major gift   | Cal   | mp NSJ Dining Hall  | 5/2/2013  | 4/2/20  | )13   | Abraham Lincoln                                       | ı                        |
| History  | Ward Cleaver              | Planned gift   | Bai   | tle Scout Ranch Endowment   | 6/29/2012   | 5/20/2  | 2012  |   |                          |
| <ul> <li>Wealth and ratings</li> <li>Interactions</li> <li>Surveys</li> <li>Documentation summary</li> <li>Web dashboard pages</li> </ul> Recent searches  Committee revenue activity Committee revenue activity Fundraising purpose profile |                           |  |   | This i<br>We ca<br>attack<br>attack<br>plan f<br>Camp                                   | s Ward's<br>an see th<br>ned to hi<br>n the nar<br>or the di<br>o NSJ pla | s prospe<br>hat he h<br>s name<br>ming op<br>ning ha<br>an name | ect page<br>as two<br>. We wa<br>portuni<br>II ask. (<br>e. | e view.<br>plans<br>ant to<br>ity to the<br>Click the |                          |

- M Application user search
- 🌺 Constituent search
- 📓 Workflow task search

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|--|--|--|--|--|----------------------|-----------------------------------|---|---------------------------------------|------------|
| Home - Constituents - Marke  | ting and Communications 🝷  | Revenue - Events   | <ul> <li>Memberships - Prosperation</li> </ul>   | cts 🔹 Foundations 🝷 Fu                             | ndraising 🔹 Web 👻 An | alysis - Administration - W       | /orkflow 🝷                              |                                       |            |
| Tasks  | Ward Cleaver<br>Major gift   | - Camp NSJ   | Dining Hall  |  |                      |                                   |   |                                       | Ward Cleav |
| <ul> <li>Make historical</li> <li>Edit primary manager</li> <li>Replace primary manager</li> <li>Edit secondary manager</li> <li>Replace secondary manager</li> <li>Request assignment</li> <li>Delete plan</li> </ul> | Prospect manager:<br>Tamera M. Butterfield<br>Primary manager:<br>John D. Kuehn<br>Secondary manager:<br>Mark V. Moshier | Start date:Curren3/1/2012Total ofStart date:\$0.004/5/2013AccepStart date:\$0.004/5/2013Site:Abrah | nt plan stage:<br>qualified opportunity amou<br>ted opportunity amount:<br>nam Lincoln | Plan start date:<br>5/2/2013<br>Secondary solicito | Plan participants    | We are no<br>NSJ plan<br>plan. We | ow viewing<br>and the sto<br>want to mo | the Camp<br>eps in that<br>ove to the |            |
| Recent searches  |  | Collision and Deal   | i in the Deservation   | Diseased Ciffs - Mana                              |                      | Opponun                           | nies lab.                               |                                       |            |
| activity<br>Fundraising purpose<br>profile<br>Application user search  | Narrative  |  |  |  |                      |                                   |   |                                       |            |
| Constituent search   |  |  |  |  |                      |                                   |   |                                       |            |
| Workflow task search   | Planned and pending  | stens (13 items) 🔊   |  |  |                      |                                   | Contact report 🗸 🎘 Write a              | letter 🖌 Edit steps 🔂 Add s           | step 💈 St  |
| Recently accessed  | Status Date  | Sta En Ti  | Owner  | Objective  | Stage                | Contact meth Has docu             | mentation Additional solicito           | Participants                          |            |
| Ward Cleaver - Major<br>giving prospect  | Date Date  | Std Ell 11   | John D. Kushn  | Discuss Common of                                  | Diagona              | Mail                              | Additional solicito.                    | Participants                          |            |
| Naming Opportunity:  | Planned 4/10/2013  |  | John D. Kuehn  | Discovery Correspond                               | Discovery            | Mail                              |   |                                       |            |
| Dining Hall  | Planned 5/12/2013  |  | John D. Kuehn  | Cultivation Plan                                   | Cultivation          | Meeting                           |   |                                       |            |
| 👫 John D. Kuehn -  | Planned 7/1/2013   |  | John D. Kuehn  | Cultivation Visit #1                               | Cultivation          | Meeting                           |   |                                       |            |
| Fundraiser   | Planned 9/29/2013  |  | John D. Kuehn  | Cultivation Visit #2                               | Cultivation          | Meeting                           |   |                                       |            |
| Naming Opportunity   | Planned 3/28/2014  |  | John D. Kuehn  | Cultivation Visit #3                               | Cultivation          | Meeting                           |   |                                       |            |
|  | Planned 4/17/2014  |  | John D. Kuehn  | Solicitation Plan                                  | Proposal Preparation |                                   |   |                                       |            |
| John D. Kuehn  | Planned 5/17/2014  |  | John D. Kuehn  | Prepare/Review Propo                               | Proposal Preparation |                                   |   |                                       |            |
| and Ratings  | Planned 6/11/2014  |  | John D. Kuehn  | Solicitation Visit                                 | Solicitation         | Meeting                           |   |                                       |            |
| METBSA\amcallis -  | Planned 7/6/2014   |  | John D. Kuehn  | Solicitation Follow-up                             | Solicitation         |                                   |   |                                       |            |
| Application User   | Planned 8/5/2014   |  | John D. Kuehn  | Acknowledgement of                                 | Stewardship          | Mail                              |   |                                       |            |
| Committee Fundraising  | Planned 8/5/2014   |  | John D. Kuehn  | Documentation of Gift                              | Closure              |                                   |   |                                       |            |

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|--|--|---|--|---|--------------------|---------------------------|--------------------|----|------------|
| Home • Constituents • Marketin   | g and Communications 👻   | Revenue 🝷   | Events • Memberships • Prospects •   | <ul> <li>Foundations - Fundrais</li> </ul>            | ing 🔹 Web 👻 Analys | sis • Administration • Wo | orkflow -          |    |            |
| Tasks  | Ward Cleaver<br>Major gift   | - Camp  | NSJ Dining Hall  |   |                    |                           |                    |    | Ward Cleav |
| <ul> <li>Make historical</li> <li>Edit primary manager</li> <li>Replace primary manager</li> <li>Edit secondary manager</li> <li>Replace secondary manager</li> <li>Request assignment</li> <li>Delete plan</li> </ul> | Prospect manager:<br>Tamera M. Butterfield<br>Primary manager:<br>John D. Kuehn<br>Secondary manager:<br>Mark V. Moshier | Start date:<br>3/1/2012<br>Start date:<br>4/5/2013<br>Start date:<br>4/5/2013 | Current plan stage:<br>Total qualified opportunity amount:<br>\$0.00<br>Accepted opportunity amount:<br>\$0.00<br>Site:<br>Abraham Lincoln | Plan start date:<br>5/2/2013<br>Secondary solicitors: | Plan participants: |                           |                    |    |            |
| Recent searches  Committee revenue activity Fundraising purpose profile  | Details Opportunities Opportunities  | Solicitors  | and Participants Documentation P   | 'lanned Gifts Manager Hi                              | story              |                           |                    |    | 7 (0       |
| Application user search  |  |   |  |   |                    |                           |                    |    | /. 0       |
| Constituent search Workflow task search  |  |   |  |   |                    |                           |                    |    |            |
|  |  |   |  | Click the   | add bu             | tton.                     |                    |    |            |
| Nard Cleaver - Major<br>giving prospect  |  |   |  | •••••   |                    |                           |                    |    |            |
| Naming Opportunity:<br>Dining Hall   |  |   |  |   |                    |                           |                    |    |            |
| John D. Kuehn -<br>Fundraiser  |  |   |  |   |                    |                           |                    |    |            |
| Naming Opportunity<br>Facilities   |  |   |  |   |                    |                           |                    |    |            |
| John D. Kuehn John D. Kuehn - Wealth<br>and Ratings  |  |   |  |   |                    |                           |                    |    |            |
| METBSA\amcallis -<br>Application User  |  |   |  |   |                    |                           |                    |    |            |
| Tommittee Fundraising  |  |   |  |   |                    |                           |                    |    |            |

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|--|--|--|---|---|-------------|-------------------------------------|-------------------------------|-------------|------------------|
| Home • Constituents • Market   | ting and Communications 🝷                                      | Revenue - Ev                           | vents • Memberships • Prosp   | ects 🔹 Foundations 🔹 Fundra                                 | sing 🝷 Web  | Analysis      Administration      W | orkflow 🔹                     |             |                  |
| Tasks ☆  | Ward Cleaver<br>Major gift                                     | - Camp N                               | NSJ Dining Hall   |   |             |                                     |                               |             | Ward Clea        |
| Make historical    Edit primary manager  Replace primary manager  Edit secondary manager | Prospect manager:<br>Tamera M. Butterfield<br>Primary manager: | Start date:<br>3/1/2012<br>Start date: | Current plan stage:<br>Total qualified opportunity amor<br>\$1,000,000.00 | Plan start date:<br>JINT: 5/2/2013<br>Secondary solicitors: | Plan partic | ipants:                             |                               |             |                  |
| <ul> <li>Replace secondary manager</li> <li>Request assignment</li> </ul>                | John D. Kuehn<br>Secondary manager:<br>Mark V. Moshier         | 4/5/2013<br>Start date:<br>4/5/2013    | Accepted opportunity amount:<br>\$0.00<br>Site:                           |   |             | You can se to ask for w             | e what we p<br>/ith this plan | lan<br>. We |                  |
| Committee revenue  |  | Collicitorio en                        | Abraham Lincoln   | Discost City - Massard                                      | F-4         | need to add<br>naming opp           | d what the<br>portunity will  | be.         |                  |
| activity   | Details Opportunitie   | s Solicitors and                       | d Participants Documentation  | Planned Gifts Manager F                                     | listory     |                                     |                               |             |                  |
| Fundraising purpose<br>profile   | Opportunities  |  |   |   |             |                                     |                               |             | G                |
| Mapplication user search   |  |  |   |   |             |                                     |                               | So to       | opportunity PEdi |
| arch 👫 Constituent search  | Status:  | Qualified                              | 0   | pportunity type: Capital                                    |             |                                     |                               |             |                  |
| 📓 Workflow task search   | Expected ask amoun   | t: \$1,000,000.00                      | Ð   | pected ask date: 7/31/2013                                  |             |                                     |                               |             |                  |
| Recently accessed  | Ask amount:  | \$0.00<br>Von: High (009               | A:  | sk date:  |             |                                     |                               |             |                  |
| Nard Cleaver - Major   | Accepted amount:   | \$0.00                                 | Ri  | esponse date:   |             |                                     |                               |             |                  |
| giving prospect<br>Naming Opportunity:<br>Dining Hall                                    | Designations:<br>Comments:                                     | Local Councils                         | \ Greater Alabama Council   |   |             |                                     |                               |             |                  |
| John D. Kuehn -<br>Fundraiser  |  |  |   |   |             |                                     |                               |             |                  |
| Naming Opportunity<br>Facilities   |  |  |   |   |             |                                     |                               |             |                  |
| 🎍 John D. Kuehn  |  |  |   |   |             |                                     |                               |             |                  |
| Iohn D. Kuehn - Wealth<br>and Ratings  |  |  |   |   |             |                                     |                               |             |                  |
| NETBSA\amcallis -<br>Application User  |  |  |   |   |             |                                     |                               |             |                  |
| Tommittee Fundraising  |  |  |   |   |             |                                     |                               |             |                  |
|  |  |  |   |   |             |                                     |                               |             |                  |

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|--|--|--|--|---|-----------------------|--|--|------------------------------|-------------------|
| Home - Constituents - Market   | ting and Communications $\star$  | Revenue • Events •   | Memberships 🔹 Prospect   | s - Foundations - Fund  | draising 🔹 Web 👻 Anal | lysis • Administration •               | Workflow -   |                              |                   |
| Tasks     ☆       ✓ Edit opportunity   | Ward Cleaver > M<br>\$1,000,000  | <sup>ajor gift</sup><br>).00 (Qualified  | l) - Opportunity   | /   |                       |  |  |                              | Ward Cleav        |
| <ul> <li>Collete opportunity</li> <li>Recent searches</li> <li>Committee revenue activity</li> <li>Fundraising purpose profile</li> <li>Application user search</li> <li>Constituent search</li> <li>Workflow task search</li> </ul>   | Current stage:   | Prospect manager:<br>Tamera M. Butterfield<br>Primary manager:<br>John D. Kuehn<br>Secondary manager:<br>Mark V. Moshier | Address:<br>485 Grant Avenue<br>Mayfield, KS 66012<br>Phone number:<br>(913) 441-1656<br>Email address:<br>ward@harper.com | Start date:<br>4/5/2013<br>Start date:<br>4/5/2013<br>Start date:<br>3/1/2012 |                       | We are<br>opportu<br>we can<br>Opportu | now viewing<br>nity. From th<br>access the I<br>inities tab. | g the<br>his view,<br>Naming |                   |
| Recently accessed  |  | wende in Naming Oppor  | campaigns  |   |                       |  |  |                              |                   |
| <ul> <li>Ward Cleaver - Major<br/>giving prospect</li> <li>Naming Opportunity:<br/>Dining Hall</li> <li>John D. Kuehn -<br/>Fundraiser</li> <li>Naming Opportunity<br/>Facilities</li> <li>John D. Kuehn</li> <li>John D. Kuehn</li> <li>John D. Kuehn - Wealth<br/>and Ratings</li> </ul> | Status:<br>Expected ask amount:<br>Actual ask amount:<br>Likelihood:<br>Accepted amount:<br>Revenue committed:<br>Comments:<br>Designation | Qualified<br>\$1,000,000.00<br>\$0.00<br>Very High (90%)<br>\$0.00<br>\$0.00   | Opportunity type: Cap<br>Expected ask date: 7/3<br>Actual ask date:<br>Response date:<br>Total paid amount: \$0.0          | oital<br>1/2013<br>00   |                       |  |  |                              |                   |
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| Application User   | Local Councils \ Greate  | r Alabama  | \$0.00   |   |                       |  |  |                              |                   |
| and Giving   | Funding types  |  |  |   |                       |  |  |                              | 🥖 Edit funding ty |
| <ul> <li>Fundraising Purpose<br/>Profile Report - Abraham<br/>Lincoln Council</li> <li>NETBSA\louislai -<br/>Application User</li> </ul>   | Funding type   | Prospect's   | interest level   |   |                       |  |  |                              |                   |
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| Blackbaud CRM™  |                                  |  |  |   | Welcor                      | me, John Kuehn 🔻   | Search All features | ρ                     | • Add new •     |
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| Blackbaud CRM <sup>™</sup>   |                                  |  |  |   | Welcome, <b>John Ku</b>               | ehn • Search All features | Add new 🔻                          |
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| Blackbaud CRM <sup>™</sup>   |   |  |  | Welcome, John Kuehn 👻 🔮   | Search All features | ρ              | Hold new 🔹      |
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| Home - Constituents - Marketin   | ng and Communications 🝷   | Revenue • Events • Me  | mberships • Prospects •  | - Foundations - Fundraising - Web - Analysis - Administration - Workflow      | •                   |                |                 |
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| <ul> <li>NETBSA\amcallis -<br/>Application User</li> <li>Committee Fundraising<br/>and Giving</li> <li>Fundraising Purpose<br/>Profile Report - Abraham<br/>Lincoln Council</li> <li>NETBSA\louislai -<br/>Application User</li> </ul>   |   |  |  |   |                     |                |                 |
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## First-Time Webinar Attendees

- Within 48 hours you will receive an email detailing how to access the CRM Design Site.
- Email will contain links to past webinar presentations.
- Log in using ScoutNET user name and password.
- User name may need **netbsa\** placed before it.



# Site Security

- Database will hold a single individual/single organization record for the whole company.
- Councils will be able to view **their** constituents' records and history.
- Constituent searches will span the entire database.
  - Councils will be able to see that someone has a record in another council but not why.



# Timeline

- 2012—System configuration, business rules, and conversion and integration discussions
- First and Second Quarters 2013—Revenue configuration, Email, and Internet Solution configuration
- Third and Fourth Quarters 2013—Mapping and conversion testing



## What to Do Now

- Single person/organization—person/ organization merge.
- Clean up campaign organization—remove workers with no prospects.
- Delete unused giving categories.



## **Questions and Tasks**

- Please submit questions using the Notes tab on your AT&T Connect window.
- If multiple people are viewing from the same computer, please email John Kuehn a list of all who are attending.









