
ROUNDTABLE

Blackbaud

Constituent Relationship Management

April 2013



Prepared. For Life.™

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



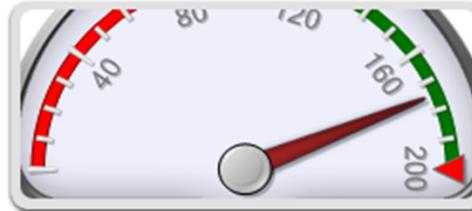
Blackbaud CRM™ for Boy Scouts of America

blackbaud®



Blackbaud CRM

Access and update your data through your web browser without a plug-in.



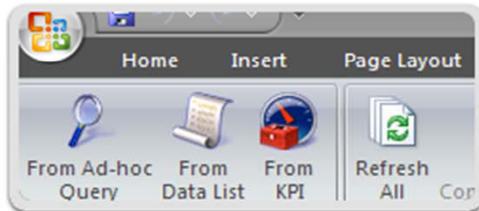
Web dashboard

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



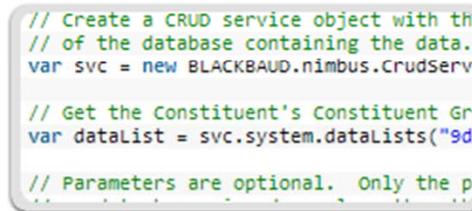
Mobilize

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



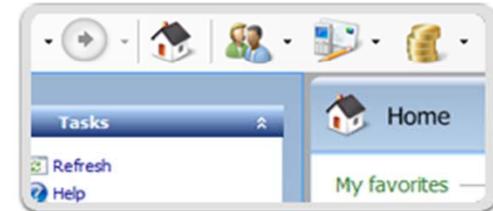
Utilities

Download utilities and add-ins to popular applications such as Microsoft Excel and Vista Sidebar, or view various reference documents.



Endpoints

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



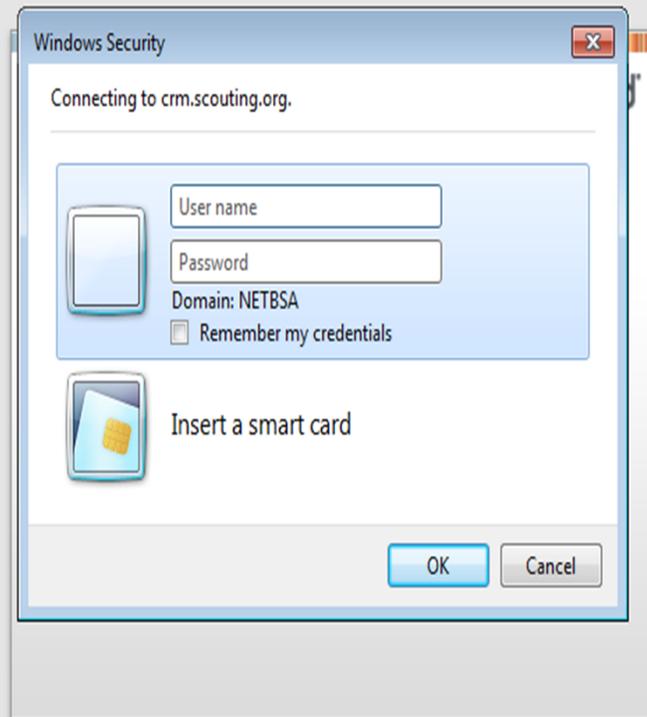
Smart Client

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



Prepared. For Life.™

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



- Recent searches
 - Constituent search
 - Campaign hierarchy search
 - Fundraising hierarchy progress
 - Application user search
 - Appeal search
- Recently accessed
 - Letters and Documents
 - NETBSA\jhendrix - Application User
 - John D. Kuehn - Wealth and Ratings
 - John D. Kuehn - Major giving prospect
 - John D. Kuehn
 - Research Request #7
 - Mapping
 - Campaign: Local Council
 - Campaign: Comprehensive Campaign
 - Fundraising Hierarchy Progress



Constituents <ul style="list-style-type: none">Constituent searchOrganization search	Revenue <ul style="list-style-type: none">Batch entry	Events <ul style="list-style-type: none">Event searchEvents overview
Prospects <ul style="list-style-type: none">My fundraiser pageMajor giving prospect searchAdd a major giving prospect	Analysis <ul style="list-style-type: none">Ad-hoc query search	Administration <ul style="list-style-type: none">Application users

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

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising and Giving
- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Fundraising

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition credit
- Campaign summary
- Designation progress
- 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

Donor challenges

- Donor challenge search
- Add a donor challenge
- Update donor challenges

Memberships

- Print membership cards

Workspaces

- Development workspace

Configuration

- Benefits catalog
- Fundraising hierarchies
- Fundraising purpose types
- Naming opportunity facilities
- VSE subcategories

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

Recent searches

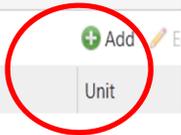
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- Constituent search
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- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Naming Opportunity Facilities

Naming opportunity facilities



Name	Address	City	State	ZIP	Area	Unit
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855		
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855	Sub Camp 1	Troop Site 1
Camp NSJ	456 Boy Scout Lane	Promise	TX	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.

Recent searches

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- Constituent search
- Workflow task search

Recently accessed

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- NETBSA\ouislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Naming Opportunity Facilities

Naming opportunity facilities

+ Add ✎

Name	Address	City	State	ZIP	Area	Unit
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855		
Camp NSJ	456 Boy Scout Lane				Sub Camp 1	Troop Site 1
Camp NSJ	456 Boy Scout Lane				Sub Camp 2	

Add a naming opportunity facility

General

Name: Area: Unit:

Address

Country: Address: City: State: ZIP:

Help

Save

Cancel

Demonstration of adding another facility.

Recent searches

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

Recently accessed

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- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Naming Opportunity Facilities

Naming opportunity facilities

+ Add ✎ E

Name	Address	City	State	ZIP	Area	Unit
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855		
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855	Sub Camp 1	Troop Site 1
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855	Sub Camp 2	
Camp NSJ	456 Boy Scout Lane	Promise	TX	78855	Sub Camp 2	Troop Site 2

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

Recent searches

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

Recently accessed

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- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Fundraising

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition credit
- Campaign summary
- Designation progress
- 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

Donor challenges

- Donor challenge search
- Add a donor challenge
- Update donor challenges

Memberships

- Print membership cards

Workspaces

- Development workspace

Configuration

- Benefits catalog
- Fundraising hierarchies
- Fundraising purpose types
- Naming opportunity facilities
- VSE subcategories

Click "Add a naming opportunity" and a form will open up for us to fill out.

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
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- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Fundraising

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose report
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name:

Description:

Type:

Quantity:

Minimum gift amount:

Location

Facility:

Contact:

Site:

Fundraising

Fundraising purpose:

Campaign:

Comments:

Special handling:



Help

Save

Cancel

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising and Giving
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- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name:

Description:

Type:

Quantity:

Minimum gift amount:

Location

Facility: 

Contact: 

Site: 

Fundraising

Fundraising purpose: 

Campaign: 

Comments:

Special handling:



Save Cancel

Fill in the 4 items on the left and then click the spyglass to search for your facility.

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
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- NETBSA\ggranum - Application User

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

Naming Opportunity Facility Search

Name: Address:

Area: City:

Unit: State:

ZIP/Postal code:

Search
Clear

Results (4 records found)

Name	Address	Area	Unit
Camp NSJ	456 Boy Scout Lane Promis...		
Camp NSJ	456 Boy Scout Lane Promis...	Sub Camp 1	Troop Site 1
Camp NSJ	456 Boy Scout Lane Promis...	Sub Camp 2	
Camp NSJ	456 Boy Scout Lane Promis...	Sub Camp 2	Troop Site 2

Conduct a blank search to pull up all of your facilities. Click Select.

Help

Select Cancel

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
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Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name: Dining Hall
Description: Seating for 600
Type: Capital Gift
Quantity: 1
Minimum gift amount: \$1,000,000.00

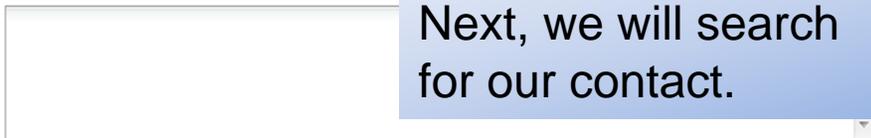
Location

Facility: Camp NSJ
Contact: 
Site: 

Fundraising

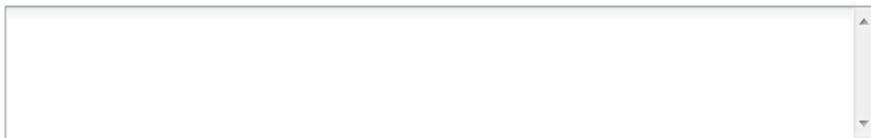
Fundraising purpose: 
Campaign: 

Comments:



Next, we will search for our contact.

Special handling:



Help

Save Cancel

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
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- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\hendrix - Application User
- NETBSA\ggranum - Application User

- Fundraising
 - Purpose search
 - Add a purpose
 - Campaign search
 - Add a campaign
 - Campaign hierar
- Naming opportu
 - Naming opportu
 - Add a naming op
- Reports
 - Campaign recog
 - Campaign summ
 - Designation prog
 - Decapitalization
 - FEP benchmarkin
 - Fundraising hiera
 - Fundraising hiera
 - Fundraising purp
 - Fundraising purp
 - Naming opportunity availability
 - Naming opportunity recognition
 - Solicitor revenue
 - VSE survey

Staff Search

Last/Org/Group name: Address:

First name: City:

Lookup ID: State:

Sites: ZIP/Postal code:

Match all criteria exactly

Advanced search options

Search in: Individuals Organizations Groups/Households

Check nickname Only search primary addresses

Check aliases Include deceased

Check merged constituents Include inactive

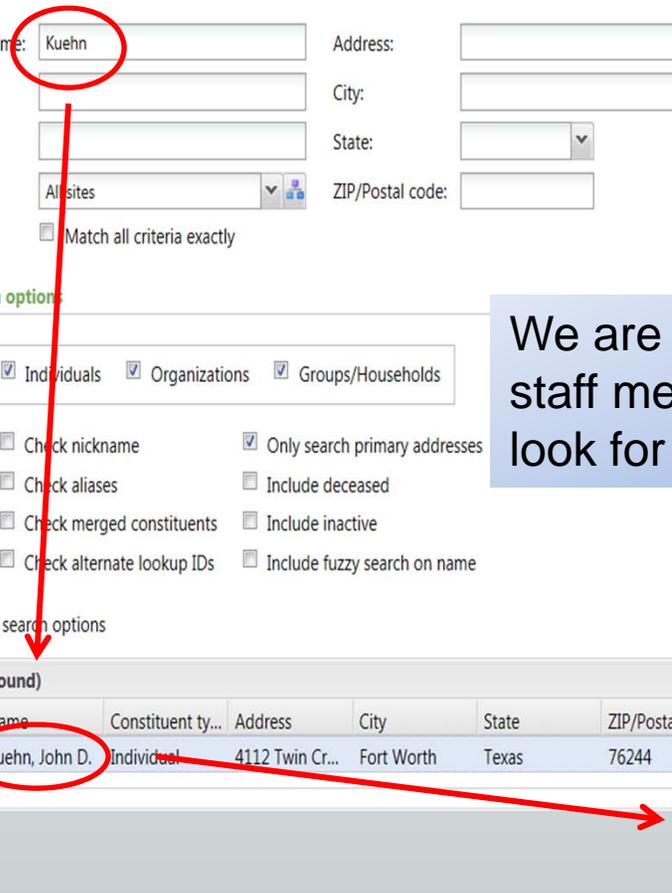
Check alternate lookup IDs Include fuzzy search on name

Hide advanced search options

Results (1 record found)

Lookup ID	Name	Constituent ty...	Address	City	State	ZIP/Postal code	Site
8-10000025	Kuehn, John D.	Individual	4112 Twin Cr...	Fort Worth	Texas	76244	Kuehn

We are searching for a staff member when we look for a contact.



Recent searches

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

Recently accessed

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- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
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- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User
- Trucks Unlimited
- NETBSA\jhendrix - Application User
- NETBSA\ggranum - Application User

Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose report
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name: Dining Hall
Description: Seating for 600
Type: Capital Gift
Quantity: 1
Minimum gift amount: \$1,000,000.00

Location

Facility: Camp NSJ
Contact: John D. Kuehn
Site: Abraham Lincoln

Fundraising

Fundraising purpose: [Yellow Highlighted]
Campaign: [Empty]

Comments:

[Empty text area]

Special handling:

[Empty text area]

Select a site and a purpose. The site will default to your council when active.



Save Cancel

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
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- Fundraising Purpose Profile Report - Abraham Lincoln Council
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Fundraising

- Purpose search
- Add a purpose
- Campaign search
- Add a campaign
- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

Fundraising Purpose Search

Name: Type:

Lookup ID: Category:

Site:

Results (More than 100 records found; only the first 100 rows are shown)

Name	Type	Category	Lookup ID	Site	Public name
Art Prints	Capital	PHLMT	Art Prints		
Bartle Fan Project	Capital	ARROW	Bartle Fan Project		
Bartle Scout Res...	Capital	ARROW	Bartle Scout Res...		
Board	Capital	ARROW	Board		
Cleveland	Capital	PHLMT	Cleveland		
Family	Capital	PHLMT	Family		
Foundations	Capital	ARROW	Foundations		
Abraham Lincol...	Council		144		
Alumni Giving	Council		AG		
Buckeye Council	Council		436		
Cherokee Area...	Council		556		
Denver Area Co...	Council		61		
AGC	Department	BSANC	AGC		
Alumni Relations	Department	BSANC	Alum		

I did a blank search and just picked a purpose that was loaded.

Recent searches

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Fundraising

- Purpose search
- Add a purpose
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- Add a campaign
- Campaign hierarchy search
- Naming opportunities
- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
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- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name:

Description:

Type:

Quantity:

Minimum gift amount:

Location

Facility:

Contact:

Site:

Fundraising

Fundraising purpose:

Campaign:

Comments:

Special handling:

Help

Save Cancel

Conduct a campaign search.

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
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Fundraising

- Purpose search
- Add a purpose
- Campaign search
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- Campaign hierarchy search

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

Campaign Search

Name: Type:

Lookup ID: Include inactive

Site:

Results (12 records found)

Name	Type	Lookup ID	Site
Abraham Lincoln Council	Local	144	
Buckeye Council	Local	436	
Cherokee Area Council	Local	556	
Comprehensive Campaign		COMP	
Denver Area Council	Local	61	
Gerald R. Ford Council	Local	266	
Greater Alabama Council	Local	1	
Heart of America Council	Local	307	
Local Council	Local	LC	
Narragansett Council	Local	546	
Patriots' Path Council	Local	358	
Sam Houston Area Council	Local	576	

Conduct a blank search and pick a campaign. I kept the campaign aligned with the site I selected. Note that campaigns will not look like this.

Help

Recent searches

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

Recently accessed

- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
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Fundraising

- Purpose search
- Add a purpose
- Campaign search
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- Campaign hierarchy search

Naming opportunities

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- Campaign summary
- Designation progress
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- Fundraising hierarchy profile
- Fundraising hierarchy search
- Fundraising purpose profile
- Fundraising purpose recognition
- Naming opportunity availability
- Naming opportunity recognition
- Solicitor revenue
- VSE survey

Add a naming opportunity

General

Name: Dining Hall
Description: Seating for 600
Type: Capital Gift
Quantity: 1
Minimum gift amount: \$1,000,000.00

Location

Facility: Camp NSJ
Contact: John D. Kuehn
Site: Abraham Lincoln

Fundraising

Fundraising purpose: Abraham Lincoln Council
Campaign: 144

Comments:

Dining hall to be heated for winter use. It will seat 600.

Special handling:

Help

Save Cancel

Tasks

- Mark inactive
- Edit naming opportunity
- Delete naming opportunity

Recent searches

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

Recently accessed

- Naming Opportunity: Dining Hall
- Ward Cleaver - Major giving prospect
- John D. Kuehn - Fundraiser
- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising and Giving
- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User

Naming Opportunity: Dining Hall

Name:	Dining Hall	Status:	Active	Location
Description:	Seating for 600	Quantity:	1	
Type:	Capital Gift	Remaining:	1	Area: Sub Camp 2
Contact:	John D. Kuehn	Minimum gift amount:	\$1,000,000.00	Unit:
Purpose:	Abraham Lincoln Council	Campaign:	Abraham Lincoln Council	Facility: Camp NSJ
Site:	Abraham Lincoln			

- General
- Recognition History
- Prospects
- Documentation

Comments

Dining hall to be heated for winter use, It will seat 600.

Special handling

Naming Opportunity view opens once you click save. We will now demonstrate how this is connected to a major giving prospect. We will jump to Ward Cleaver.

Tasks

- Flag prospect
- Edit prospect manager
- Replace prospect manager
- Request prospect manager
- Edit prospect status

View as

- Constituent
- Committee member
- Event registrant
- Group member

More information

- Revenue and recognition
- Communications
- Extended network
- History
- Wealth and ratings
- Interactions
- Surveys
- Documentation summary
- Web dashboard pages

Recent searches

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



Ward Cleaver - Major giving prospect

Ward Cleaver - Major giv



485 Grant Avenue
Mayfield, KS 66012
+1 (913) 441-1656
ward@harper.com

Prospect manager:
Tamera M. Butterfield
Start date:
3/1/2012

Spouse:
June Cleaver
Household:
Mr Ward Cleaver and Mrs June Cleaver
Prospect status:

Active constituencies: CRM Name Major giving prospect Event registrant Committee member

- Plans
- Prospect Team
- Planned Gifts
- Funding Interests
- Campaigns
- Prospect Manager History

Plans

+ Add ▾ + Request major giving plan Make active Del

Sites: All sites ▾ Include historical plans App

Constituent	Plan type	Plan name	Start date	Date added	Sites
Ward Cleaver	Major gift	Camp NSJ Dining Hall	5/2/2013	4/2/2013	Abraham Lincoln
Ward Cleaver	Planned gift	Bartie Scout Ranch Endowment	6/29/2012	5/20/2012	

This is Ward's prospect page view. We can see that he has two plans attached to his name. We want to attach the naming opportunity to the plan for the dining hall ask. Click the Camp NSJ plan name.

Tasks

- Edit plan details
- Make historical
- Edit primary manager
- Replace primary manager
- Edit secondary manager
- Replace secondary manager
- Request assignment
- Delete plan

Recent searches

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

Recently accessed

- Ward Cleaver - Major giving prospect
- Naming Opportunity: Dining Hall
- John D. Kuehn - Fundraiser
- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising

Ward Cleaver
Major gift - Camp NSJ Dining Hall

Ward Cleaver

Prospect manager: Tamera M. Butterfield
 Start date: 3/1/2012
 Current plan stage: Total qualified opportunity amount: \$0.00
 Plan start date: 5/2/2013
 Plan participants:
 Primary manager: John D. Kuehn
 Start date: 4/5/2013
 Accepted opportunity amount:
 Secondary manager: Mark V. Moshier
 Start date: 4/5/2013
 Site: Abraham Lincoln

We are now viewing the Camp NSJ plan and the steps in that plan. We want to move to the Opportunities tab.

- Details **Opportunities** Solicitors and Participants Documentation Planned Gifts Manager History

Narrative

Planned and pending steps (13 items)

+ Contact report | Write a letter | Edit steps | + Add step | St

Status	Date	Sta...	En...	Ti...	Owner	Objective	Stage	Contact meth...	Has documentation	Additional solicio...	Participants
Planned	4/16/2013				John D. Kuehn	Discovery Correspond...	Discovery	Mail			
Planned	5/7/2013				John D. Kuehn	Discovery Visit	Discovery	Meeting			
Planned	5/12/2013				John D. Kuehn	Cultivation Plan	Cultivation				
Planned	7/1/2013				John D. Kuehn	Cultivation Visit #1	Cultivation	Meeting			
Planned	9/29/2013				John D. Kuehn	Cultivation Visit #2	Cultivation	Meeting			
Planned	3/28/2014				John D. Kuehn	Cultivation Visit #3	Cultivation	Meeting			
Planned	4/17/2014				John D. Kuehn	Solicitation Plan	Proposal Preparation				
Planned	5/17/2014				John D. Kuehn	Prepare/Review Propo...	Proposal Preparation				
Planned	6/11/2014				John D. Kuehn	Solicitation Visit	Solicitation	Meeting			
Planned	7/6/2014				John D. Kuehn	Solicitation Follow-up	Solicitation				
Planned	8/5/2014				John D. Kuehn	Acknowledgement of...	Stewardship	Mail			
Planned	8/5/2014				John D. Kuehn	Documentation of Gift	Closure				

Tasks

- Edit plan details
- Make historical
- Edit primary manager
- Replace primary manager
- Edit secondary manager
- Replace secondary manager
- Request assignment
- Delete plan

Recent searches

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

Recently accessed

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- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising

Ward Cleaver
Major gift - Camp NSJ Dining Hall

Ward Cleav

Prospect manager:	Start date:	Current plan stage:	Plan start date:	Plan participants:
Tamera M. Butterfield	3/1/2012	Total qualified opportunity amount:	5/2/2013	
Primary manager:	Start date:	\$0.00	Secondary solicitors:	
John D. Kuehn	4/5/2013	Accepted opportunity amount:		
Secondary manager:	Start date:	\$0.00		
Mark V. Moshier	4/5/2013	Site:		
		Abraham Lincoln		

- Details
- Opportunities**
- Solicitors and Participants
- Documentation
- Planned Gifts
- Manager History

Opportunities



Click the add button.

Tasks

- Edit plan details
- Make historical
- Edit primary manager
- Replace primary manager
- Edit secondary manager
- Replace secondary manager
- Request assignment
- Delete plan

Recent searches

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

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- NETBSA\amcallis - Application User
- Committee Fundraising

Ward Cleaver Major gift - Camp NSJ Dining Hall

Ward Cleaver

Prospect manager:	Start date:	Current plan stage:	Plan start date:	Plan participants:
Tamera M. Butterfield	3/1/2012	Total qualified opportunity amount:	5/2/2013	
Primary manager:	Start date:	\$1,000,000.00	Secondary solicitors:	
John D. Kuehn	4/5/2013	Accepted opportunity amount:		
Secondary manager:	Start date:	\$0.00		
Mark V. Moshier	4/5/2013	Site:		
		Abraham Lincoln		

You can see what we plan to ask for with this plan. We need to add what the naming opportunity will be.

- Details
- Opportunities**
- Solicitors and Participants
- Documentation
- Planned Gifts
- Manager History

Opportunities



[Go to opportunity](#) [Edit](#)

Status:	Qualified	Opportunity type:	Capital
Expected ask amount:	\$1,000,000.00	Expected ask date:	7/31/2013
Ask amount:	\$0.00	Ask date:	
Likelihood:	Very High (90%)		
Accepted amount:	\$0.00	Response date:	
Designations:	Local Councils \ Greater Alabama Council		
Comments:			

Tasks

- Edit opportunity
- Delete opportunity

Recent searches

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

Recently accessed

- Ward Cleaver - Major giving prospect
- Naming Opportunity: Dining Hall
- John D. Kuehn - Fundraiser
- Naming Opportunity Facilities
- John D. Kuehn
- John D. Kuehn - Wealth and Ratings
- NETBSA\amcallis - Application User
- Committee Fundraising and Giving
- Fundraising Purpose Profile Report - Abraham Lincoln Council
- NETBSA\louislai - Application User

Ward Cleaver > Major gift
\$1,000,000.00 (Qualified) - Opportunity

Ward Cleav

Current stage:	Prospect manager:	Address:	Start date:
	Tamera M. Butterfield	485 Grant Avenue Mayfield, KS 66012	4/5/2013
	Primary manager:	Phone number:	Start date:
	John D. Kuehn	(913) 441-1656	4/5/2013
	Secondary manager:	Email address:	Start date:
	Mark V. Moshier	ward@harper.com	3/1/2012

We are now viewing the opportunity. From this view, we can access the Naming Opportunities tab.

- Details
- Associated Revenue
- Naming Opportunities**
- Campaigns

Opportunity details

Status:	Qualified	Opportunity type:	Capital
Expected ask amount:	\$1,000,000.00	Expected ask date:	7/31/2013
Actual ask amount:	\$0.00	Actual ask date:	
Likelihood:	Very High (90%)		
Accepted amount:	\$0.00	Response date:	
Revenue committed:	\$0.00	Total paid amount:	\$0.00
Comments:			

Designation

Name	Amount	Funding Method	Category	Type	Use code
Local Councils \ Greater Alabama...	\$0.00				

Funding types

Edit funding ty

Funding type	Prospect's interest level
--------------	---------------------------

Tasks

- Edit opportunity
- Delete opportunity

Recent searches

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

Recently accessed

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Ward Cleaver > Major gift
\$1,000,000.00 (Qualified) - Opportunity

Ward Cleav

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	Primary manager:	Phone number:	Start date:
	John D. Kuehn	(913) 441-1656	4/5/2013
	Secondary manager:	Email address:	Start date:
	Mark V. Moshier	ward@harper.com	3/1/2012

Details | Associated Revenue | **Naming Opportunities** | Campaigns

Naming opportunities

+ Add recognition | **+ Add** | Edit | De

Naming opportunity	Recognized
--------------------	------------

Click the Add button.

Tasks

- Edit opportunity
- Delete opportunity

Recent searches

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

Recently accessed

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- Naming Opportunity: Dining Hall
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\$1,000,000.00 (Qualified) - Opportunity

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	Primary manager:	Phone number:	Start date:
	John D. Kuehn	(913) 441-1656	4/5/2013
	Secondary manager:	Email address:	Start date:
	Mark V. Moshier	ward@harper.com	3/1/2012

Details | Associated Revenue | **Naming Opportunities** | Campaigns

Naming opportunities

Naming opportunity	Recognized

Add a naming opportunity

Naming opportunity: 

[Help](#)

Search for the naming opportunity.

- Tasks
- Edit opportunity
 - Delete opportunity

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

- Recently accessed
- Ward Cleaver - Major giving prospect
 - Naming Opportunity: Dining Hall
 - John D. Kuehn - Fundraiser
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Ward Cleaver > Major gift
\$1,000,000.00 (Qualified) - Opportunity

Current stage:

Details Associated Rev
Naming opportunities
Naming opportunity

Naming Opportunity for Major Giving Search

Name: Area:
Type: Unit:
Fundraising purpose: Facility:
Campaign: Site:

Minimum gift amount

From: \$0.00 Include inactive naming opportunities
To: \$0.00 Include unavailable naming opportunities

Results (1 record found)

Name	Descripti...	Amount	Type	Remaini...	Fundrais...	Campaign	Area	Unit	Facility	Active fu...
Dining...	Seating...	\$1,000,0...	Capital...	1	Abraha...	Abraha...	Sub Ca...		Camp NSJ	

I did a blank search to pull up all available opportunities. Once you find it, click Select.

Tasks

- Edit opportunity
- Delete opportunity

Recent searches

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

Recently accessed

- Ward Cleaver - Major giving prospect
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\$1,000,000.00 (Qualified) - Opportunity

Ward Cleav

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	Primary manager:	Phone number:	Start date:
	John D. Kuehn	(913) 441-1656	4/5/2013
	Secondary manager:	Email address:	Start date:
	Mark V. Moshier	ward@harper.com	3/1/2012

Details Associated Revenue Naming Opportunities Campaigns

Naming opportunities

+ Add recognition | + Add Edit X De

Naming opportunity	Recognized
Dining Hall	

You now have a naming opportunity added to a gift plan.

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.



Conference View Participants Whiteboard Audio/Video Recording Help

Raise Hand Send Note Step Out Whiteboard Audio Unmute My Video

Meeting in Progress
Connection: Good
No Audio Selected

Participants (1) Notes

Notes transcript:

mark.moshier@scouting.org
john.kuehn@scouting.org

To: [dropdown]
[input] Send

App Sharing Materials W

Currently Shared Application(s):
Go To Desktop [arrow]
End Sharing

AT&T Connect



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Q&A



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