



# Blackbaud's 2008 Higher Ed Forum

## Blackbaud Product Road Map

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### Blackbaud Product Road Map



#### Trends driving our overall product direction

- ◆ Provide a comprehensive view of constituents (volunteers, prospects, donors, etc.)
- ◆ Offer the ability to interact with constituents through multiple channels and adapt to their personal preferences
- ◆ Meet the total solution needs of specific verticals and varying size organizations
  - Consolidated view of major/planned and annual/direct giving programs
  - Enabling multi-channel communications tailored to how organizations interact with their constituents
- ◆ Improve analytical understanding of financial performance and donor behavior
- ◆ Leverage contemporary technology platform to enable business and IT demands
  - Web-based access
  - Ability to configure applications by organizational role
  - Open platform supporting integration and customization

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## 2008 Product Roadmap summary

- ◆ Continue to deepen internet capabilities for four key verticals (Education, Healthcare, Family and Human Services, Faith-based)
  - Deepen existing functionality (email marketing, Team Fundraising, donations, content management)
  - Enable new functionality (social networking, eStickers, accessibility)
- ◆ Deepen functionality in our three newest products
  - Blackbaud Enterprise CRM (4 releases)
  - Blackbaud College Student Information System (2 releases)
  - Blackbaud Direct Marketing (3 releases)
- ◆ Deliver two web-based, SaaS new solutions leveraging the Infinity Platform
  - ResearchPoint (The Researcher's Edge)
  - Blackbaud NetCommunity Universal ("Scorpio") – standalone internet product [i.e. does not require RE]
- ◆ Complete design for next-generation versions (v8.x) of The Raiser's Edge, The Financial Edge, and The Patron Edge
- ◆ Deliver the first three milestones for the Team Approach roadmap (of four total)



## Next Generation CRM

- ◆ Fast Facts:
  - BLKB expects to do ~\$300MM in sales this year, we invest approx 14% of that in R&D.
  - We have ~ 250 people within Product Development
  - ~ 175 people are currently working on this new platform to build applications
- ◆ We have spent 2-3 years building out the next generation platform
  - All next generation products will be developed on this platform which currently serves as the basis for Blackbaud Enterprise CRM, Research Point and Blackbaud Direct Marketing
- ◆ After the platform was built, it was turned over to the application development team. The Platform team continues to develop tools while the application team develops features.
- ◆ We intend to go to market with one platform....a platform built for scalability and ease of use
- ◆ New platform offers
  - Web based deployment
  - Smart client to provide richer user interface
  - Role based access
  - More granular security
  - Ability to deliver new features or changes more rapidly



## Integration between Blackbaud Products

- ◆ Blackbaud is designing The Raiser's Edge 8 and The Financial Edge 8 at the same time to enhance the integration of data...integrated data model
  - Single person record – data viewed and functionality will depend on the user's role
  - Certain RE fund types will drive a single RE/FE record
  
- ◆ Business intelligence will be part of the solution
  - Some reporting will be driven off the transactional database
  - Some reporting will be driven off a data mart
  - Reports will surface as part of a workflow
  - Reports and dashboards will be distributable over the web
  - RSS feeds can be used to deliver alerts
  
- ◆ Web integration will be part of workflows as applicable
  - Set up a new event and then publish content and registration pages to the web
  - Publish changes to membership levels and benefits to the web once they are created in the back office



# HIGHER EDUCATION FEATURE FOCUS



## Higher Education Profiles

- ◆ 2 classes of customers – the major difference between the two types of customers is whether they are looking for prescribed versus custom capabilities
  - One class is looking for a Platform / Tool set upon which they can code their own standardized practices, specific integrations and develop extensions.
    - These type customers demand a more robust development environment
    - These type customers have developed their own best practices and want to drive those practices across a decentralized organization
  - Others desire a solution or application with embedded best practices
    - Use those embedded best practices to drive change into their organization
- ◆ Blackbaud's next generation will deliver both these options on the same platform
  - Whichever solution a customer chooses will be scalable, web deployed and role based



## Higher Education Market

- ◆ 4 general models
  1. State or private universities with multiple fundraising offices – generally with multiple professional or graduate schools
  2. Private undergraduate institutions with a single development office serving multiple departments
  3. A separate foundation established for the purpose of raising money for state universities
  4. Loosely affiliated consortia of independent colleges
- ◆ Models 1 and 4
  - Decentralized fundraising efforts – multiple offices/sites raising money for their specific schools/function/departments
  - Generally desire to coordinate across these multiple offices but want to retain autonomy and ownership for specific donors
  - Require consolidated reporting
- ◆ Models 2 and 3
  - Centralized development efforts – one office/site is tasked is raising all the money for all departments/programs



## Important points

- ◆ Fundraising features will be the same in both the Enterprise CRM product and The Raiser's Edge Version 8
  - Main difference between E-CRM and RE 8 will be around multi site management, ability to create brand new workflows
  - Functionality for major and planned giving, annual fund management, stewardship, cultivation, membership management, volunteer management, event management, etc. will be the same
  - Both systems will offer house-holding features for more efficient mailing management and grouping features for targeted major and planned giving
  
- ◆ All roles will be workflow / process based
  - A person's job function will determine their view of the system
    - Stewardship coordinators will primarily have a fund management view into the data
    - Managers will primarily have a team based view into the system
    - MGO officers will have a view around their pipeline, moves and assigned prospects
    - Prospect researchers will have a different experience than an event coordinator



## Feature Focus for Higher Education – Changes in the next Generation

- ◆ Major Giving/Planned Giving – **Current functionality. Expect to enhance based on client feedback**
  - Fundraising plans for Moves Management
    - Ability to create individualized plans for prospects or to create templates for moves management
  
  - Pipeline management and reporting for both dollars/cash flow as well as activities
    - Provides a management view as well as a view for an individual fundraiser
    - Capture reporting relationships to support reporting/analysis needs
  
  - Integration with Outlook through Exchange Server
    - Syncs with PDAs through Exchange server
    - Automated bi-directional exchange of information – interactions, tasks and events - between the CRM system and Outlook
    - Ability to populate individual fundraiser's contacts with their assigned constituents
  
  - Group Giving / House holding
    - Manage households / families / related funds and foundations as a single entity
    - Have an aggregated view of the group or household's giving with drill through to individual records that make up the household or group



## Changes in the next generation

- ♦ Major Giving/Planned Giving continued... **Current functionality**
  - Improved abilities for handling recognition including tributes
    - Catalog recognition opportunities and associate them with donations
    - More flexibility in how recognition is structured – i.e. spread over multiple years
    - Catalog sponsorship opportunities and associate them with donations
  - Improved abilities to capture and utilize constituent preferences around different communications
    - User defined address, email, phone types
    - Unlimited seasonal addresses
  
- ♦ Annual Fund Management – **Current functionality**
  - Ask ladders – making sure you are asking for more this year than last
  - Integration with the Web for multi channel solicitation
  - Ability to easily create phonathon lists
  - Alumni Association membership renewals
  - Ability to measure return on investment by segment solicited and method



## Changes in the next generation

- ♦ Constituent Life Cycle Management – **Roadmap 2H2009. Client feedback welcome**
  - Assign donors to the appropriate fundraising plan from initial gift to major/planned leadership giving
  - Define multiple constituent engagement ladders based dimensions other than straight giving – event attendance, volunteering
  - Create and assign plans to move donors to progressively higher tiers
  - Benchmarking and performance measurement of strategy's success
  - Activity calendar views
  
- ♦ Membership - **Roadmap 2 phases – 4Q08 and 1Q09. Client feedback welcome but most likely will be implemented at a later date**
  - Track status, levels, tiers
  - Upgrade, downgrade, and conversion analyses
  - Track and assign membership benefits to levels and tiers
  - Benefit inventory management
    - Storage locations, re-order points
    - Attach media, values, costs, shipping info and customer service tracking
  - Support complex gift type rules to determine upgrades, downgrades, renewals
  - Support for pledge drives



## Changes in the Next Generation

- ♦ Stewardship Roadmap 2 phases – 4Q08 and 1Q09. Client feedback welcome but most likely will be implemented at a later date
  - Track endowed funds – purpose, original donor, donor reporting requirements
  - Link donors to endowments and recipients
  - Tracking and reporting of fund performance, income and expenses
  - Donor and internal beneficiary stewardship reporting
  - Stewardship plans, tracking and plans
- ♦ Naming opportunities – Roadmap 4Q08. Client feedback welcome but most likely will be implemented at a later date
  - Create a catalog of naming opportunities
  - Associate a naming opportunity to a plan/opportunity or a donation – reserve an opportunity, remove an opportunity from “inventory” once funded
- ♦ Event and Volunteer enhancements – Roadmap 2H09 or later. Client feedback welcome
  - Event registration stages can be user defined
  - Support for committee structures, position levels, date ranges
  - Event registration batch processing



## Changes in the next generation

- ♦ Corporate and Foundation Relations – Roadmap 4Q08. Client feedback welcome but most likely will be implemented at a later date
  - Create a catalog of funding requests
  - Create a catalog of grant-making corporations or foundations
  - Manage grant application process and deadlines
  - Record grant awards and payments
  - Enhanced grant reporting – e.g. outcomes
  - Challenge grant support
  - Government grant solicitation
- ♦ Enhanced Corporation / Subsidiary record sets - Roadmap 4Q08. Client feedback welcome but most likely will be implemented at a later date
  - Manage subsidiaries of large corporations (adding, removing, merging)
  - Corporate hierarchies that incorporate employees, giving contacts, prospect plans and interactions
  - Manage corporations/subsidiaries and employees as a single entity
- ♦ Enhanced education record information - Roadmap 1H09
  - Degree information, college and reunion year affinity as well as sports/club affiliations



## Changes in the Next Generation

- ◆ Calendar Views – Roadmap 2H09. Client feedback welcome
  - Constituent focused calendar views – know at a glance what is happening with that constituent
  - Function oriented calendars – grant application deadlines, grant reporting deadlines, planned events, communication drops
- ◆ Accessibility - Roadmap 2H09. Client feedback welcome
  - Full compliance with Section 508 accessibility requirements
- ◆ PCI/PABP compliance – Roadmap 1Q09. Client feedback welcome but most likely implemented at a later date
  - Remove credit card numbers and store a token or an ID instead
  - Will provide integration with services that allow you to retain current credit card processing relationships
- ◆ Performance management - Roadmap 2H09. Client feedback welcome
  - Track staff activities/metrics for individuals as well as teams - # of interactions, # of moves
  - Goal setting and goal attainment visibility
  - System performance management too...



## Changes in the Next Generation

- ◆ Alumni/Donor service management - Roadmap 2H09. Client feedback welcome
  - Capture incoming phone/email requests/issues from constituents
  - Ability to associate multiple interactions to a single donor service case
  - Routing and escalation workflows
  - Reporting and performance management
- ◆ Enhanced Capital Campaign Reporting - Currently in the product, expect to enhance based on customer feedback
  - Defining what gifts count towards the campaign
  - Presentation of planned gifts within campaign reporting
  - Recognition towards campaign goals
- ◆ Key performance indicators – Currently in the product, expect to enhance based on feedback
  - Set goals and monitor progress against those goals at a glance
  - Set parameters around acceptable levels
  - Widgets that can be placed on desktop – without opening the system
  - Alerts through RSS feeds – new gifts over \$XXXX are fed through RSS



## Changes in the Next Generation

- ◆ Prospect Research – **Current functionality. Client feedback welcome**
  - Completely integrated to the enterprise CRM system
  - Role based access provides ability to control who sees what
  - Fully integrated Web services for data scrubbing, wealth info, appendable relationships
    - Platform enables to add new Web based services as they emerge
  
- ◆ And now.....a quick demo of the system



Questions?