

# Blackbaud University Curriculum for Blackbaud CRM™

Blackbaud University offers educational opportunities that support all Blackbaud CRM training needs, from the *implementation* phase to *go-live* end-user training. Additionally, our *Software Development Kit (SDK)* and *Page Designer* courses are designed to enhance technical expertise for building and managing any customization of Blackbaud CRM.

Blackbaud instructor-led courses include Project Team Training, End User Training, and Technical Training.

If you prefer training to be delivered by your in-house training team (which will require you to modify and deliver our supplied base materials), view the **JumpStart** offering in the listing.

In each topic area, courses are listed in the order they should be taken.	Private Training	Training Materials
<b>PROJECT TEAM TRAINING FOR BLACKBAUD CRM 4.0</b>		
Core Principles 1 for Project Team Training	●	
Core Principles 2 for Project Team Training	●	
Prospect Management for Project Team Training	●	
Batch and Revenue Processing for Project Team Training	●	
Communication for Project Team Training	●	
Event Management for Project Team Training	●	
Direct Marketing for Project Team Training	●	
Data Analysis for Project Team Training	●	
Stewardship Programs for Project Team Training	●	
Membership Management for Project Team Training	●	
Volunteer Management for Project Team Training	●	
Wealth and Ratings for Project Team Training	●	
Database Administration and Configuration Tasks	●	
<b>END USER TRAINING FOR BLACKBAUD CRM 4.0</b>		
Fundamentals	●	
Constituent Management	●	
Prospect Management 1	●	

In each topic area, courses are listed in the order they should be taken.

	Private Training	Training Materials
<b>END USER TRAINING FOR BLACKBAUD CRM 4.0 (continued)</b>		
Prospect Management 2	•	
Revenue	•	
Revenue Communications	•	
Direct Marketing	•	
Event Management	•	
Volunteer Management	•	
Sponsorship	•	
Data Analysis	•	
Appeal Mailings	•	
Wealth and Ratings	•	
Stewardship Programs	•	
Membership Management	•	
<b>JUMPSTART</b>		
JumpStart Training Materials		•
<b>TECHNICAL TRAINING FOR SUPER USERS OF BLACKBAUD CRM 4.0</b>		
Page Designer	•	
<b>TECHNICAL TRAINING FOR THE BLACKBAUD SOFTWARE DEVELOPMENT KIT (SDK) DEVELOPERS</b>		
Software Development Kit - Fundamentals	•	
Software Development Kit - Data Structures	•	
Software Development Kit - Data Forms	•	
Software Development Kit - Global Change	•	
Software Development Kit - Lists and Queries	•	
Software Development Kit - Pages	•	
Software Development Kit - Batch	•	
API Programming in CRM	•	
Developing a UI Model	•	
<b>TECHNICAL TRAINING FOR REPORTING IN BLACKBAUD CRM</b>		
Standard Outputs	•	
Data Warehouse Reporting	•	
Data Warehouse Customization	•	
Transactional Reporting	•	

## Project Team Training

**Project Team Training** introduces your project team members to the Blackbaud CRM system and provides instruction for out-of-the-box use in order to better equip the team to facilitate system design sessions. Courses consist of feature demonstrations, discussion, and hands-on practice to enhance the learning experience of training participants. Contact your Blackbaud Account Manager for additional information.

Proposed breakdown of classes in suggested order:

	Day 1	Day 2	Day 3	Day 4	Day 5
	<b>Project Team Training</b>				
<b>A.M.</b>	Core Principles 1	Prospect Management	Communications	Choose one 3-hour or two 1.5-hour classes from the table below	Choose one 3-hour or two 1.5-hour classes from the table below
<b>P.M.</b>	Core Principles 2	Batch and Revenue	Event Management	Choose one 3-hour or two 1.5-hour classes from the table below	Choose one 3-hour or two 1.5-hour classes from the table below

**Note: Project Team Training** agendas for **Day 4** and **Day 5** can be tailored to include classes specific to your organization's Blackbaud CRM configuration. Two 1.5-hour classes can be combined to fill one **Morning** or one **Afternoon** session. Select from the topics below to suit your needs.

3-Hour Classes	1.5-Hour Classes
Direct Marketing	Stewardship
Membership Management	Data Analysis
	Volunteer Management
	Wealth and Ratings

## End User Training

**End User Training** provides end users the information needed for a successful launch of Blackbaud CRM, and gives those end users the skills needed for day-to-day use of the system. Modules required for **End User Training** are specific to each organization's needs. However, all **End User Training** engagements should begin with the Blackbaud *Fundamentals* modules.

If your organization requires training on Prospects, your engagement must include the modules:

- Blackbaud CRM: Constituent Management
- Blackbaud CRM: Prospect Management 1
- Blackbaud CRM: Prospect Management 2
- User Acceptance Testing Training

## User Acceptance Testing Training

**User Acceptance Testing Training** equips testers with the appropriate Blackbaud CRM product knowledge to effectively execute and perform test cases. This training occurs prior to the testing phase of the implementation process. Work within your own Blackbaud CRM data. In instances when custom data is not available at the time of training, standard CRM training data is used.

## Technical Training

### Blackbaud CRM: Software Development Kit - Fundamentals

This course provides developers the foundational skills necessary to manipulate the Blackbaud CRM interface using the Blackbaud CRM Software Development Kit (SDK).

	Day 1	Day 2	Day 3
	<b>Blackbaud CRM: Software Development Kit - Fundamentals</b>		
<b>A.M.</b>	Fundamentals Overview	Global Change	Lists and Queries
<b>P.M.</b>	Data Structures	Data Forms	Pages

### Blackbaud CRM: Software Development Kit - Batch

This course provides developers the tools they need to develop fully functioning batch-type templates for processing groups of records within Blackbaud CRM.

	Day 1	Day 2
	<b>Blackbaud CRM: Software Development Kit - Batch</b>	
<b>A.M.</b>	Understanding and Developing a Custom Batch 1	Validation Process and Post Commitment Exceptions 1
<b>P.M.</b>	Understanding and Developing a Custom Batch 2	Validation Process and Post Commitment Exceptions 2