



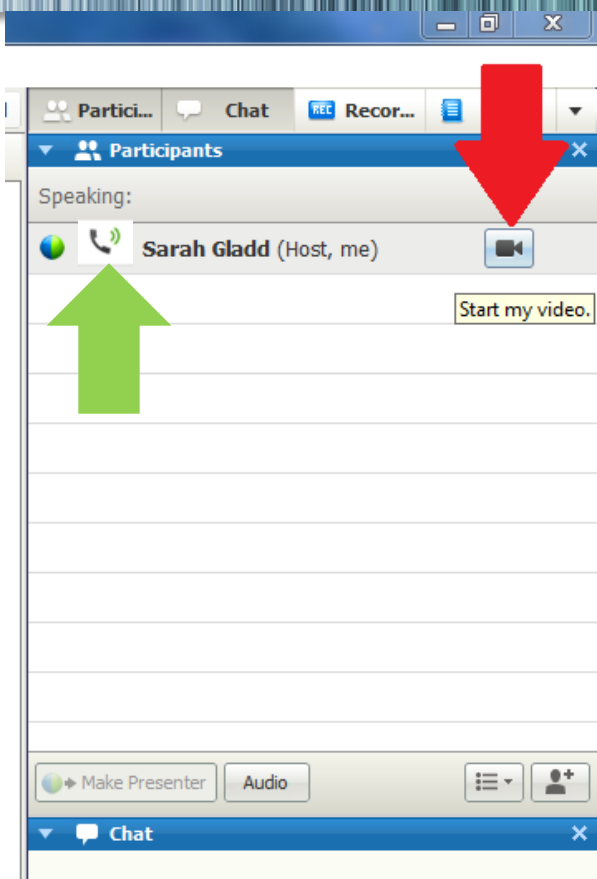
➤ **HIGHER EDUCATION PRODUCT  
ADVISORY GROUP MEETING**

**February 2012**

## ► HOUSE KEEPING ITEMS

- Please remember to mute your phones unless directly engaging in conversation
  - \*6 = Mute
  - #6 = Unmute
- You are welcome to come and go throughout the 2 hour agenda; however, full participation is encouraged
- Feel free to enable your Web cameras using the WebEx attendee control



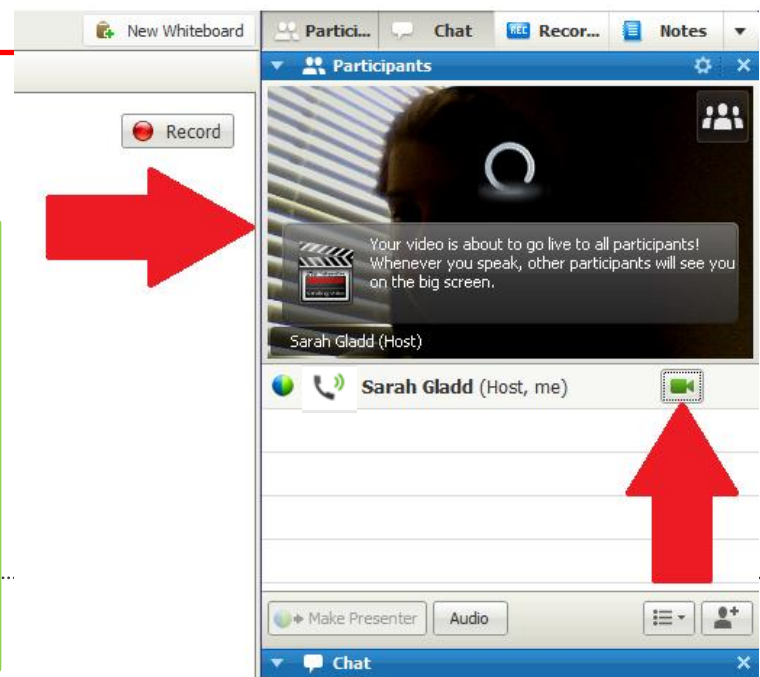


### To Start Video:

1. Make sure your Webcam is properly installed & being recognized by your computer
1. Hit the icon with a Camera image to the right of your name in the WebEx meeting (pictured on the left)
1. After you hit the button, the Camera image will turn Green (pictured below)
1. Your camera shot will stream live to all attendees (pictured below)


### To Connect to Audio:

1. Call-in toll-free number: 1-866-4106539
2. Conference Code: 843 654 3232
3. Go To: Meeting information Tab (upper left hand side of screen)
4. Enter "Attendee ID Code" into your phone (w/ the # signs)



5. A Phone Icon will appear to the left of your name

## ► AGENDA

11:00 – 11:30	Blackbaud CRM Q1 2012 Update	
11:30 – 12:00	New Web User Interface	
12:00 – 12:30	What's New with Blackbaud Internet Solutions	
12:30 – 1:00	Roundtable Discussion	



Eric de Jager, Director, Enterprise Product Management

# ENTERPRISE CRM

## Q1 2012 UPDATE

► **BLACKBAUD = RESULTS > (PEOPLE + COST)**

## ► THREE PHASES OF THE CRM ROADMAP

**Available  
Today**

CRM

2011 Q3  
Release

(v2.91)

**Coming  
Attractions:**

**Q1 2012**

Membership  
Enhancements

Simplify UI

Import and  
duplicate mgmt

New reporting  
capabilities

**New Discovery**

Configurable batch  
logic

Sustainer  
marketing

Integrated  
Marketing

Simplify funds &  
designations

Analytics

Trit Mulligan, Product Manager

# MEMBERSHIP Q1 2012 OVERVIEW



## ► AGENDA

- Member Services View
- Rapid Entry and Review
- Membership Setup and Configuration
- Membership Reporting and Analysis
- Summary of upcoming discovery

## ► MEMBER SERVICES VIEW

*Customer quotes:*

“Quick, intuitive, clean, light years from where we are today.”

“I am a fan”

## ► MEMBERSHIP RAPID ENTRY AND REVIEW

*Customer quotes:*

“Completely different than what we have now”

“You guys certainly listened to me!”

"I'm not worried about the ones entered in correctly, I'm worried about the ones entered incorrectly."

## ➤ MEMBERSHIP SETUP AND CONFIGURATION

*Customer quotes:*

“You’ve come a long way”

“Completely different from what we have seen so far”

“When can I get this!”



## ► MEMBERSHIP REPORTING AND ANALYSIS

## ► UPCOMING MEMBERSHIP DISCOVERY FOCUS

### Industry leading membership solution

- Manage dues, contribution, lifetime, recurring membership programs
- Support pledging, discounting and adding additional membership revenue
- Benefit management
- Premium management

### Simplify the experience

- Rapid Entry and Review
- Communications (renewals, promotions)
- Member Services View

### Lead with information

- Smart Software - Alerts and Triggers
- Custom canned reports
- Dashboards
- Data Warehouse
- Lifecycle of a member

### Reduce manual effort

- Automation of data entry through pre-configured options
- Member self service (targeted for Q3)
- Member life changes

### Member to Member Connections

- Communities
- Social Media
- Mobile capabilities



Jay Nathan, Director, Platform Product Management

# WEB SHELL

## ► BLACKBAUD CRM: COMING TO A BROWSER NEAR YOU!

Benefits of moving to the browser:

### Improved Usability

- Better overall usability – redesigned UI and info architecture
- More easily customize core product screens
- Native spell checking in most browsers

### Better Accessibility

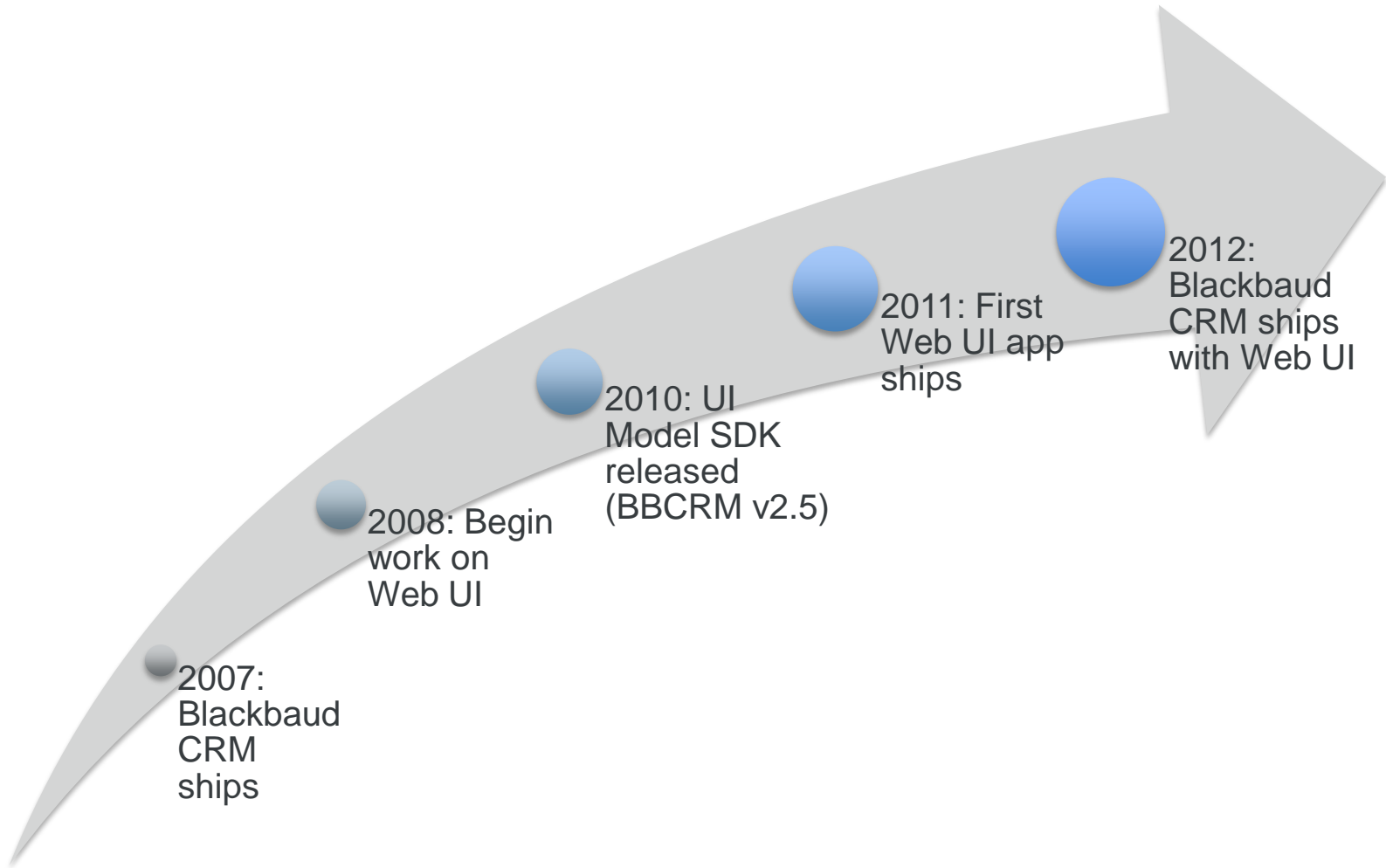
- Works on many devices including iPads and Macs
- Access from browser anytime, anywhere

### Simplified Deployment

- No special setup required to support ClickOnce
- Lighter payload transferred to user's computer



## ► SOME HISTORY



## ► LOOKING AHEAD

- Browser access by default beginning with Blackbaud CRM 2.93
- Q3, 2012 release will be the last to include ClickOnce
  - Support duration for 2012 releases is still being determine based on customer need
- To upgrade to 2.93, no modification necessary to customizations built using the UI Model SDK
- ClickOnce is still supported (C-Grade browser support model)
  - Some items will not be in Web UI, but will remain available in ClickOnce
    - Page Designer
    - Revenue Batch

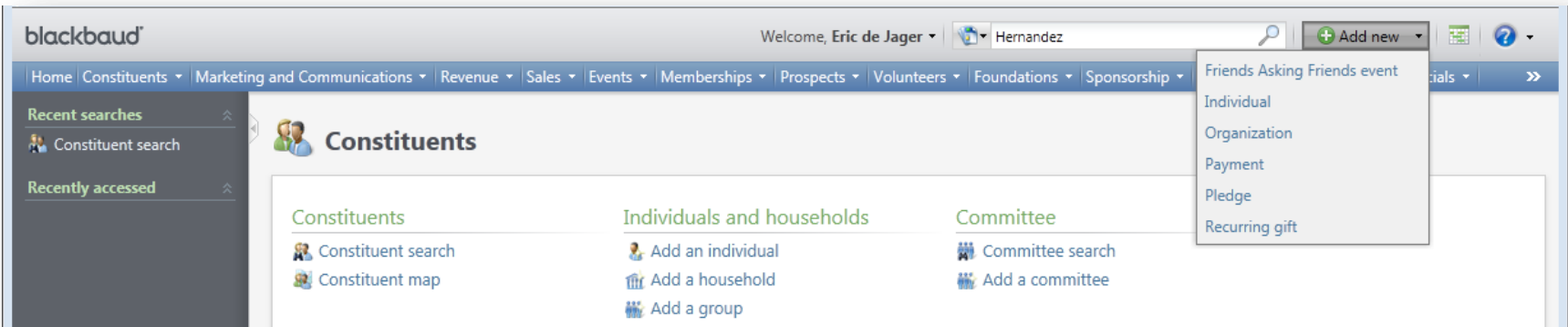
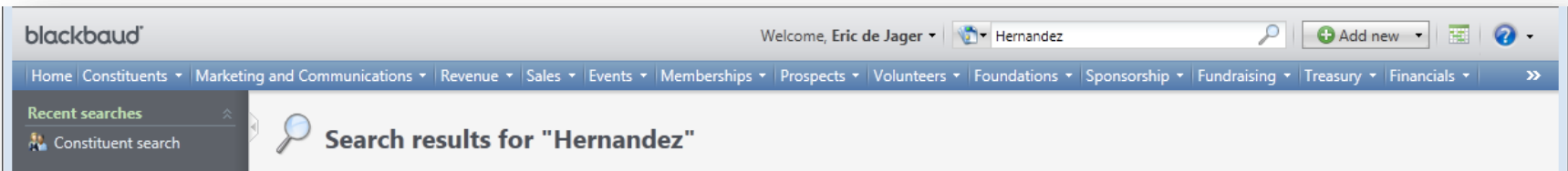
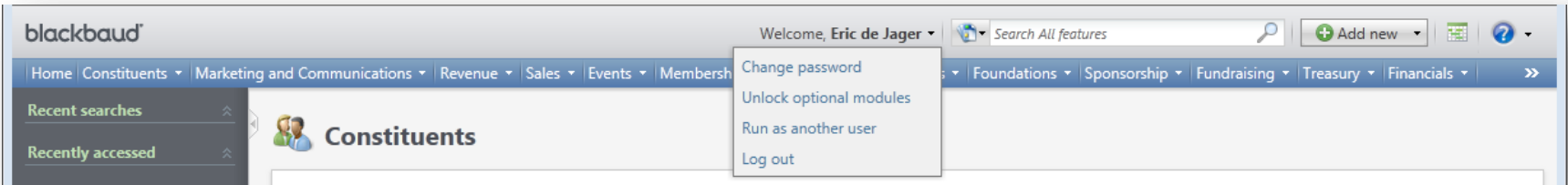
## ► WHAT DOES THIS MEAN TO ME?

- If your CRM deployment is live:
  - Minimal impact expected if you began implementation on Blackbaud CRM 2.5 or later
  - Non-UI Model customizations will need to be converted prior to upgrade
  - Blackbaud Support team will help to determine if changes are needed
  - Your TAM will help...
    - Analyze your database
    - Develop a Web UI migration plan
- If you are still implementing CRM:
  - Be sure UI Model SDK is being used (should be true for most customizations)
  - Work with Support to analyze your database
    - Services teams are currently validating all current implementations
  - Make sure you're compliant, ***even if you're not going live on 2.93!***

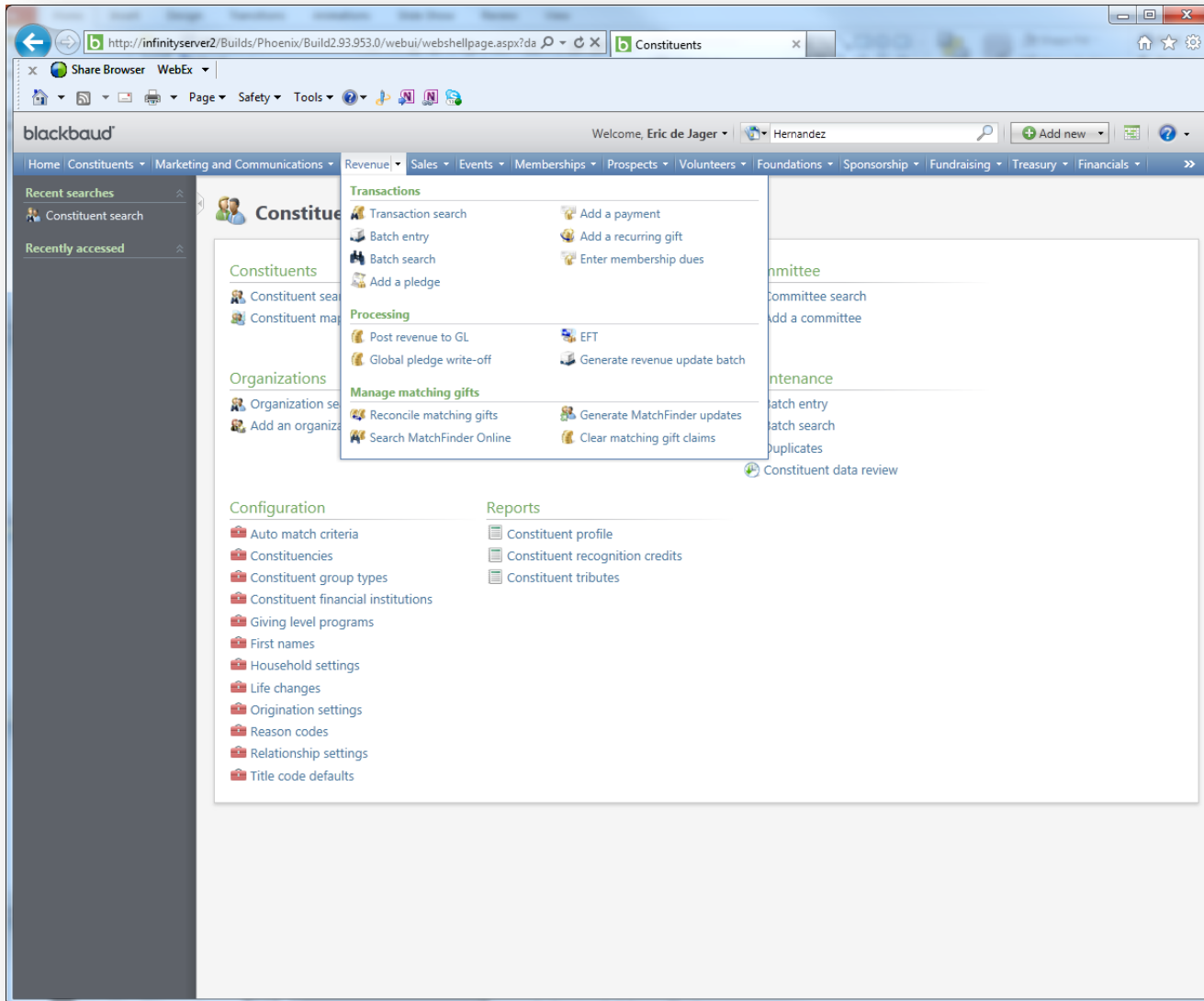


► **SOME CHANGES AT A GLANCE**

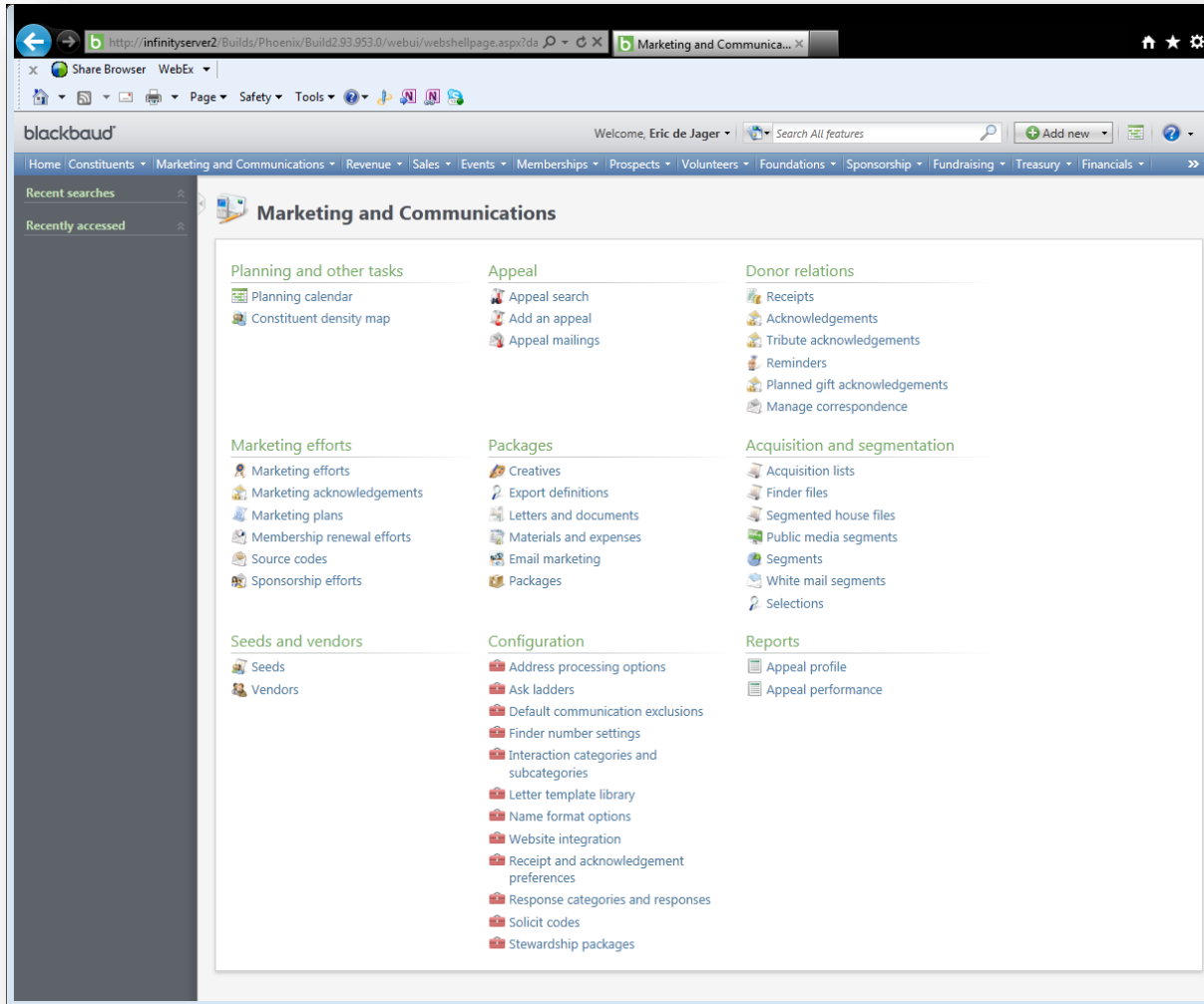
# ► HEADER AND TOP NAVIGATION



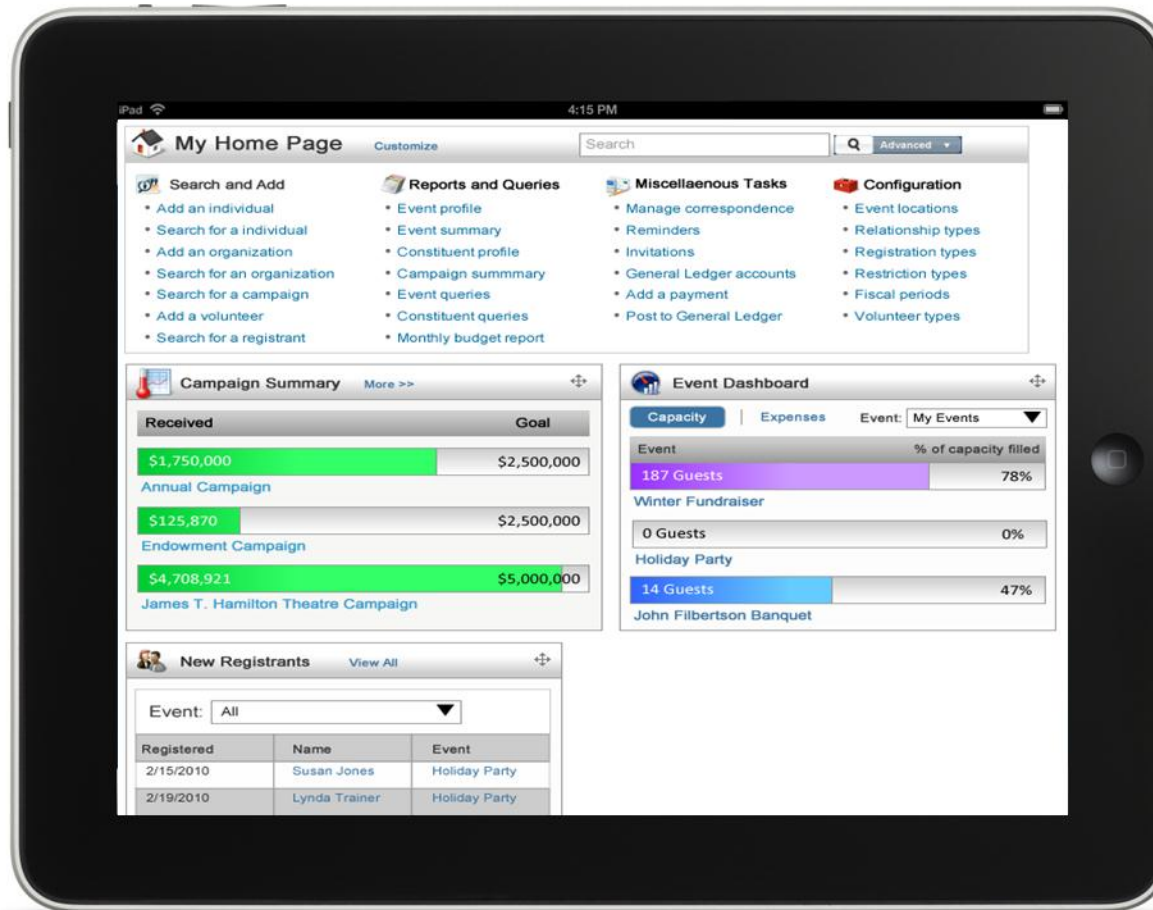
# ► BILLBOARD MENUS



# ► NEW FUNCTIONAL AREA PAGES



# ► ACCESS BLACKBAUD CRM ON YOUR IPAD







► **DISCUSSION & QUESTIONS**



► **THANKS!**

Jay Nathan

Director, Platform Product Management

[jay.nathan@blackbaud.com](mailto:jay.nathan@blackbaud.com)

843-654-3317

@jaynathan

Steve MacLaughlin, Director, Internet Solutions Product  
Management

# WHAT'S NEW WITH BLACKBAUD INTERNET SOLUTIONS

# ▶ THREE PHASES OF OUR PRODUCT ROADMAPS



# ▶ RELEASED IN 2011



ID	Description
<a href="#">86643</a>	Giving search listing needs links to “more” in the description. 1404
<a href="#">112213</a>	Ability for Account Owner to select/modify the data associated with BBEC “contact type types”
<a href="#">123017</a>	Designations require a thumbnail image to be displayed on a designation search listing
<a href="#">123031</a>	Ability to search on broad metro area, and other international geographic areas (Western Europe, Central Asia).
<a href="#">123032</a>	Ability for the online constituent to view designations they've given to in the past within the context of designation search with ability to click on a link to give to that designation.
<a href="#">137335</a>	Challenge grant match in designation search
<a href="#">137391</a>	Email signup improvements
<a href="#">137684</a>	Ability to deliver different (additional) stylesheets to browsers (IE Screen, print, mobile, WAI)
<a href="#">137726</a>	ONLINE: Ability to send to the contact type type email address that has been designated as primary.
<a href="#">137975</a>	Increase the number of users and roles available in CMS targeting and security
<a href="#">148411</a>	Preview CSS and layout changes
<a href="#">148412</a>	BBIS & BB Social Integration (career networking)
<a href="#">148824</a>	Ability to choose any exportable BBEC field to be utilized as merge fields in a BBNC email
<a href="#">150570</a>	User registration form missing ability to add address type when signing up and giving an address
<a href="#">138159</a>	Associate BBIS users with BBEC users and respect BBEC security - Usability
<a href="#">140702</a>	Email, ecards, forms, etc to respect CMS sites
<a href="#">142048</a>	Improve ability to find email messages
<a href="#">144944</a>	Ability to move BBIS objects between sites
<a href="#">144957</a>	Ability for OC to add, search for, and display class notes
<a href="#">128755</a>	Online: Add interest element to profile form type in form engine
<a href="#">27883</a>	SUMMARY: Ability to pay bills online.
<a href="#">16808</a>	SUMMARY: Donor needs to be able to edit recurring gift options and make pledge payments from the Giving History 2.0 part
<a href="#">123336</a>	Add ability to use page with a Communication Preferences Form part on it to satisfy the email opt out link requirement
<a href="#">125028</a>	Form level custom properties into Communication Preferences
<a href="#">132876</a>	Add Privacy Settings to the Multi Address Element
<a href="#">113328</a>	Add General Correspondence Form Element
<a href="#">113329</a>	Add Solicit Codes Form Element

# ▶ RELEASED IN 2011



ID	Description
<a href="#">113330</a>	Add Appeal Preferences Form Element
<a href="#">113331</a>	Add Event Preferences Form Element
<a href="#">113332</a>	Add Reminder Preferences Form Element
<a href="#">113333</a>	Add Receipt Preferences Form Element
<a href="#">113334</a>	Add Acknowledgement Preferences Form Element
<a href="#">113335</a>	Add "eOptions" Preferences Form Element
<a href="#">115944</a>	Individual Multi-address Controls
<a href="#">121316</a>	Multiple Addresses - Support the selection of preferred address
<a href="#">122655</a>	Add a merge field to the Donation custom confirmation screen and acknowledgement email that surfaces the impact statement for the Designation(s)
<a href="#">122659</a>	Add the ability to surface a list of appeals the donor has received
<a href="#">123025</a>	ONLINE: (BBEC) Ability for transactions within a queue to be separated by type (e.g., one large College of Business queue allows a transaction processor to create multiple batches based upon separate events)
<a href="#">86634</a>	ONLINE: Allow display and edit of certain contact preferences on the gift form for selection of recurring charge notification.
<a href="#">86640</a>	ONLINE: Show matching gift challenge funds when a gift qualifies.
<a href="#">163657</a>	Ability to display the designation purpose impact statement
<a href="#">135508</a>	ONLINE: BBNC Code Refactoring\Use business processes in Infinity to setup BBNC windows services.
<a href="#">73640</a>	ONLINE: Ability to hold a history of jobs (a la Facebook)/Employment History
<a href="#">42251</a>	ONLINE: BBE: 3DS secure info to be added to donation piece
<a href="#">73617</a>	ONLINE: Ability to enter historical information (Multi-org)
<a href="#">73619</a>	ONLINE: Ability to include name formats and associate communications with formats
<a href="#">123023</a>	ONLINE: Ability for constituent to provide telephone numbers in their profile for all contact type types of contact type "phone" and designate one as primary.
<a href="#">123024</a>	ONLINE: Ability for constituent to provide email addresses in their profile for all contact type types of contact type "email" and designate one as primary.
<a href="#">123028</a>	ONLINE: (BBEC) Ability to associate a BBEC transaction processing queue with a form
<a href="#">24813</a>	ONLINE: SUMMARY: Sync with BBEC communication preferences
<a href="#">111225</a>	ONLINE: 'CONTROL' Ability to designate which is "Primary" on phone numbers, email and postal addresses

# ▶ RELEASED IN 2011



ID	Description
<a href="#">86635</a>	ONLINE: Transaction notifications settings by donor and staff regarding recurring credit card charges.
<a href="#">115947</a>	ONLINE: Individual Employment History Control
<a href="#">115948</a>	ONLINE: Ind Employ History - BBNC SVC changes
<a href="#">115949</a>	ONLINE: Ind Employ History - Plug-in changes
<a href="#">137720</a>	ONLINE: Ability to mark an address inactive/ remove address from profile form (2.0)
<a href="#">143465</a>	ONLINE: Ability to reorder itmes in a filtered list within an element
<a href="#">137724</a>	ONLINE: Record invalid email address to the constituent's record
<a href="#">137725</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC
<a href="#">140933</a>	ONLINE: Ability to categorize emails (event, appeal, general correspondence), and assign them to a site (s/c/u)
<a href="#">128757</a>	ONLINE: Allow attributes in PF type to display multiselect or dropdown based on attribute "one per record" setting
<a href="#">137732</a>	ONLINE: Ability to make user login elements non-editable in profile form (2.0)
<a href="#">149347</a>	ONLINE: Record invalid email address to the constituent's record
<a href="#">149357</a>	ONLINE: Ability to categorize emails (event, appeal, general correspondence), and assign them to a site (s/c/u)
<a href="#">137722</a>	ONLINE: Show online activity in a "more info" view rather than behind a constituency in eCRM
<a href="#">148387</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC
<a href="#">150653</a>	ONLINE: Allow attributes in PF type to display multiselect or dropdown based on attribute "one per record" setting
<a href="#">150792</a>	ONLINE: Ability to delete phones/email
<a href="#">150658</a>	ONLINE: Ability to make user login elements non-editable in profile form (2.0)
<a href="#">137731</a>	ONLINE: Ability to "remove" a spouse from your record in profile form (2.0)
<a href="#">150512</a>	ONLINE: Front of form > No visual context or additional information on element summary
<a href="#">150513</a>	ONLINE: Education element > Front of form > Styling for add new is not the same for other relationship/multiple elements
<a href="#">150514</a>	ONLINE: Education element > Plugin > No lookup for schools in the education list
<a href="#">150515</a>	ONLINE: Employment > Front of form > Sort job history most recent at the top of list and descend based on dates from there
<a href="#">150516</a>	All > Element editor > Can't consistently re-order the fields in the editor (education and addresses for example)
<a href="#">150655</a>	ONLINE: Show online activity in a "more info" view rather than behind a constituency in eCRM
<a href="#">150529</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC
<a href="#">150531</a>	ONLINE: Record invalid email address to the constituent's record
<a href="#">150533</a>	ONLINE: Ability to categorize emails (event, appeal, general correspondence), and assign them to a site (s/c/u)

# ▶ RELEASED IN 2011

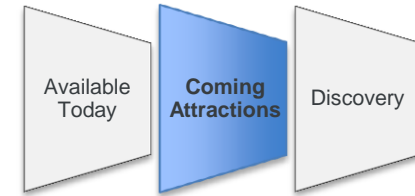


ID	Description
<a href="#">152954</a>	ONLINE: Transaction Manager Gaps (post UM demo)
<a href="#">152866</a>	ONLINE: Front of form > Allow choice of what fields to show in summary
<a href="#">152867</a>	ONLINE: Ability to "remove" a spouse from your record in profile form (2.0)
<a href="#">152868</a>	ONLINE: Education element > Plugin > No lookup for schools in the education list
<a href="#">150517</a>	ONLINE: All relationship elements > Front of form > Want column heading on element
<a href="#">153055</a>	ONLINE: Ability to categorize emails (event, appeal, general correspondence), and assign them to a site (s/c/u)
<a href="#">153060</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC
<a href="#">155252</a>	ONLINE: CMS Social Media enhancement to capturing additional information
<a href="#">154785</a>	ONLINE: Add Education History Privacy (bug 154002)
<a href="#">154786</a>	ONLINE: Add middle name to user registration form
<a href="#">154787</a>	ONLINE: Add responsibility text area to Employment History
<a href="#">154788</a>	ONLINE: Ability to mark a specific employment relationship as "private"
<a href="#">154832</a>	ONLINE: Designation shopping needs to add split gifts to shopping cart instead of multiple gifts
<a href="#">152354</a>	ONLINE: BBIS Appeal Summary reporting in CRM
<a href="#">154848</a>	ONLINE: Ability to categorize emails (event, appeal, general correspondence), and assign them to a site (s/c/u)
<a href="#">154849</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC
<a href="#">154840</a>	ONLINE: Front of form > Allow choice of what fields to show in summary
<a href="#">154845</a>	ONLINE: Education element > Plugin > No lookup for schools in the education list
<a href="#">159595</a>	ONLINE: Affiliated institutions - make non-editable\Education Elements in Profile Form
<a href="#">159597</a>	ONLINE: Add two new fields to Education Involvement Element Profile Form
<a href="#">159675</a>	ONLINE: CMS Social Media enhancement to capturing additional information
<a href="#">159676</a>	ONLINE: Add responsibility text area to Employment History
<a href="#">159677</a>	ONLINE: Ability to mark a specific employment relationship as "private"
<a href="#">159679</a>	ONLINE: Designation shopping needs to add split gifts to shopping cart instead of multiple gifts
<a href="#">159656</a>	ONLINE: Implementation of 3 DS/3DS in BBNC
<a href="#">159669</a>	ONLINE: BBIS Appeal Summary reporting in CRM
<a href="#">161475</a>	ONLINE: Image gallery usability - auto select image after uploading
<a href="#">159600</a>	ONLINE: Ability to automatically place in the constituent's BBEC communication tab a record of each email sent via BBNC



# ▶ COMING ATTRACTIONS

## ► BBIS 2.93 (Q1 2012)



Functional Area	Description
Usability	Ability to reorder events & designations on forms
Notifications	Notify staff via email when a new donation or event registration occurs
Site Security	Site-secure transaction batch assignments
Secure Payments	Automatic updating of BBSP look & feel
Integration	Finder number support, interest attributes, assign BBIS transactions to different batch templates
Infrastructure	Reduce upgrade time by 20%
Infrastructure	Remove COM Service & Windows Service

***NOTE: Items subject to change prior to final release***

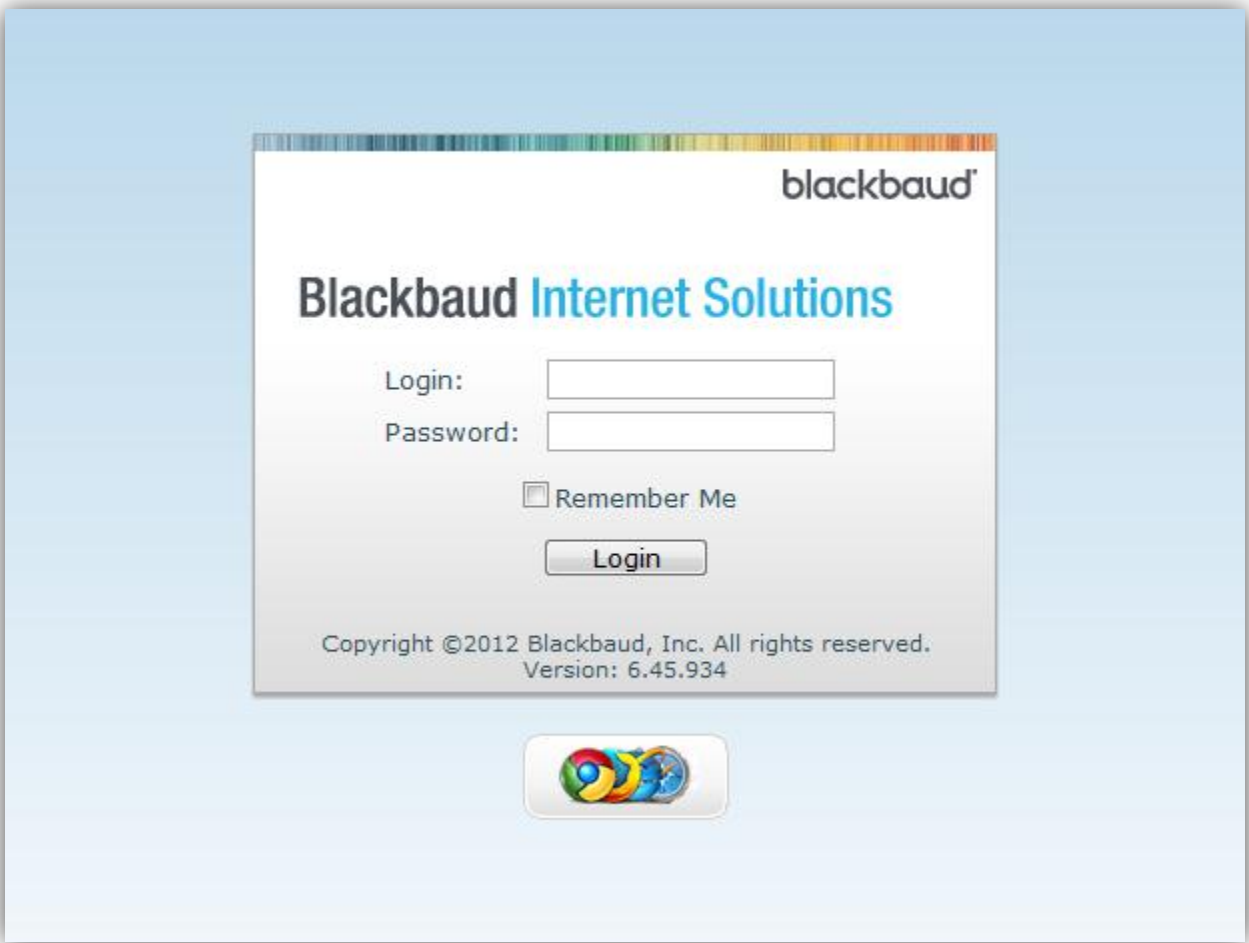
## ► BBIS 2.93 (Q1 2012)



Functional Area	Description
CMS	Improved tagging/organization abilities for images, email lists, & parts
CMS	Friendly URLs everywhere
CMS	Preserve image file names & extensions
CMS	Bulk delete & move (foldering) for parts pages, and email lists
CMS	Support for Chrome, Opera, Safari for BBIS admins
CMS	301 redirects
CMS	In-line help videos

***NOTE: Items subject to change prior to final release***

# ► BROWSER SUPPORT



# ▶ HELP VIDEOS



View site | Create | History | Site explorer | Email | Users & security | Administration | Help

Main Site > Email Logged in as Supervisor: [Logout](#)

## Email

[View tutorial](#)

### Campaigns

Create and manage campaigns to target groups of website users with email efforts

### Messages

Create and manage email messages, and view reports about the messages you send

### Acknowledgements

Create and manage email acknowledgements, and view reports about the acknowledgements you send

### Lists

Create and manage lists to target groups with email messages using queries or imported files

### eCard templates

Create and manage eCard templates for website users to personalize

### Templates

Create and manage templates to use as starting point design email messages

### Newsletters

Create and manage templates for newsletters, and generate issues

### Notifications

Create and manage email messages to alert website users about actions on your website

### Invalid accounts

Review and manage email addresses that have been reported by the hosting ISP

### Scheduled emails

Create and manage email messages to send at specific times

### Email overview

Send an email

Create an email list

Create an email template

## Pages & templates

[+ New page](#)
[+ New template](#)
[Help](#)

From Pages & templates, you create and edit pages and templates, organize them in folders, and manage the content on your website.

Folders

- Deleted Pages/Templates
- Website
  - Admin
  - test
  - Pages
  - Templates
  - Training

Website\Pages

[Move](#) [Delete](#)

	Action	Page name	Page type
<input type="checkbox"/>		About Us - Landing	Page
<input type="checkbox"/>		About Us - Privacy policy	Page
<input type="checkbox"/>		Authorization Failed	Page
<input type="checkbox"/>		Change User ID/Password Confirmation	Page
<input type="checkbox"/>		Change User ID/Password Form	Page
<input type="checkbox"/>		Contact Us	Page

46 pages/templates meet selected criteria 1 | 2 | 3 | Next

**About Us - Landing**

Page content | Properties | Preview

Action	Part name	Part type
	About Us - Landing - Text	Formatted Text and Images

# ► CMS & URL IMPROVEMENTS



**Page details**

Page name: \* ⓘ  
About Us

Folder: \*  
Website

Template from site: \*  
Blank Client Site

Template: \*  
<Select a Template>

Browser title: ⓘ  
About Us

Page URL: ⓘ  
Website/About Us ✓  
http://www.testsite.org/Website/About Us !

**Page metadata**  
... existing metadata UI goes here

# ▶ ONLINE GIVING GROUP



## ▶ **PRODUCT ADVISORY GROUP – ONLINE GIVING FOCUS**

### • **Areas of Focus**

1. Understand the needs of Higher Education online donors
2. Improve the online giving experience for Higher Education donors
3. Capture both required and additional gift information from donors
4. Enable optimal gift processing for online donations

## ▶ PRODUCT ADVISORY GROUP – ONLINE GIVING FOCUS

### • Members

- Ryan Bersani – Boston University
- Mark Clay – University of Oxford
- Katie Culbertson – The Ohio State University
- Elain Evans – University of British Columbia
- Brennan Hadden – Southern Methodist University
- Vikki Jablonski, University of Michigan
- Mike Reilly – University of North Carolina at Chapel Hill
- John Sponauer – University of Connecticut
- Wes Waters – Wake Forest University

# ▶ **PRODUCT ADVISORY GROUP – ONLINE GIVING FOCUS**

## **Recent Activities:**

- One-on-one sessions with each group to review current donation forms
- Follow-up questions and requirements gathering
- Survey questions to rank key online giving elements
- Additional discovery work to develop multiple development options

## **Next Meeting:**

- February 14<sup>th</sup> to review progress
- First review of donation form prototypes

## **Target Goal:**

- Release initial set of online donation form improvements in Q3 2012 release

# ► DISCOVERY

## ► Q3 2012 DISCOVERY AREAS

- **Donation Form Flexibility**
  - Specific focus on Higher Education institutions
- **Email Usability**
  - Optimizing the user experience and performance
- **Transaction Management**
  - Complementary work along with import and batch improvements

► QUESTIONS? ANSWERS?

**blackbaud**<sup>™</sup>  
your passion ► our purpose

Ryan Scapellato, Senior Manager, Customer Experience

# BLACKBAUD CRM CUSTOMER SUMMIT

## ► CRM CUSTOMER SUMMIT LOCATIONS



Blackbaud  
Corporate  
Headquarters on  
Daniel Island

The Sanctuary on  
Kiawah Island





## ► **ROUNDTABLE**

Moderated by: **Eric de Jager**, Director of CRM and  
**Ryan Scapellato**, Senior Manager of Customer Experience



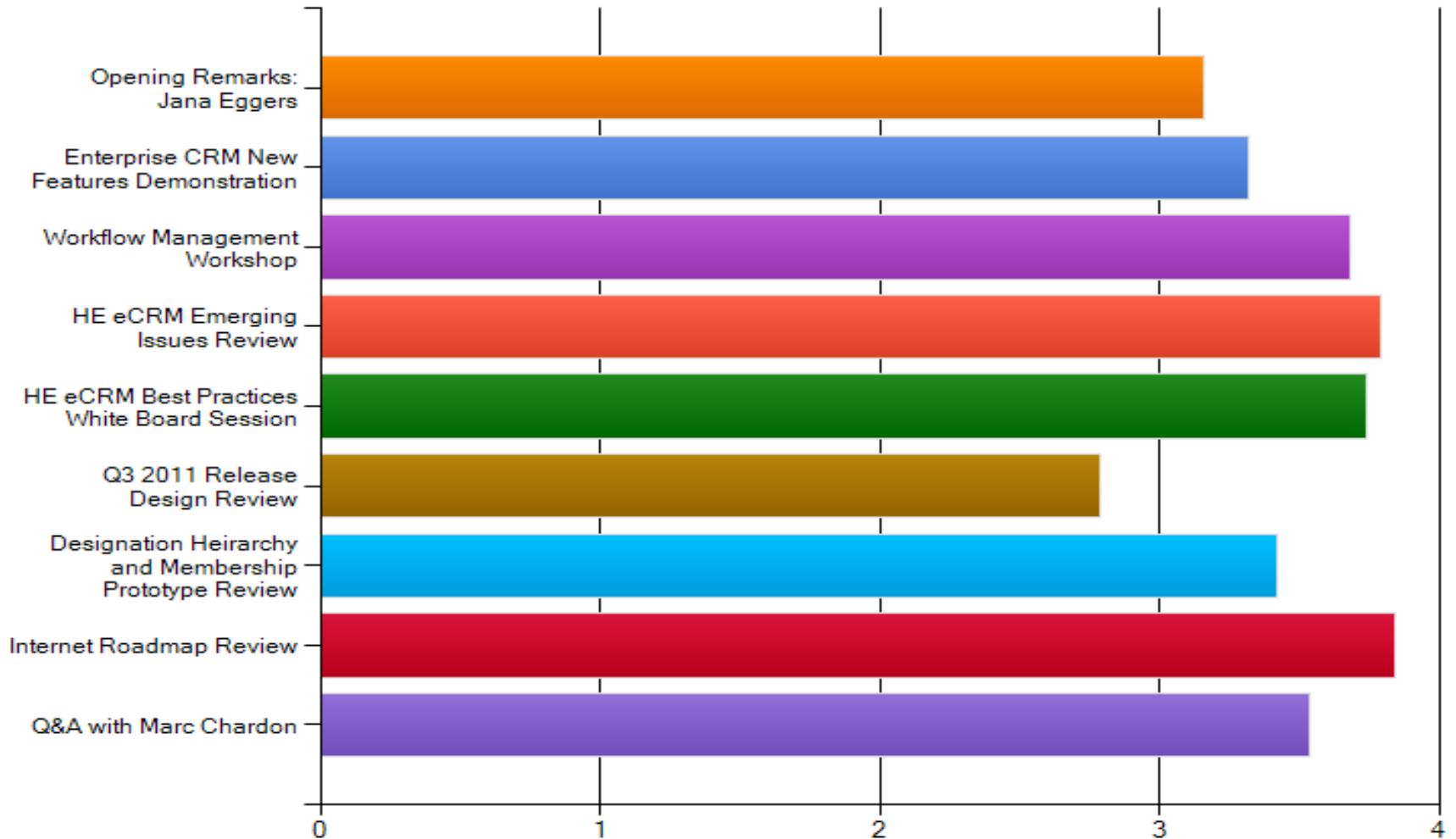
**blackbaud**<sup>™</sup>  
your passion > our purpose

# ➤ AGENDA AT A GLANCE

Tuesday, May 15, 2012			Wednesday, May 16, 2012			Thursday, May 17, 2012
PAG - HE	TAP - TA	TAP - CRM	PAG - HE	TAP - TA	TAP - CRM	All
DI/KI			KI			KI
Breakfast			Breakfast			Breakfast
Business Meetings			Business Meetings			Business Meetings
Lunch			Lunch			
Business Meetings			Business Meetings			Closing Luncheon
Transport to Kiawah Island			Networking Activity			CRM Customers depart CHS
Check-in						
Networking Event at Mingo Point			Free-time			

<b>Legend:</b>		: Travel Time
		: Business Meetings
		: Free-time / Optional
		: Networking Events

**Please rate the value of the sessions you attended during the Enterprise Customer Summit:**



Respondents were asked to rate the sessions off the following criteria:  
 (1= Below Average, 2= Average, 3=Above Average, 4= Excellent, and N/A)

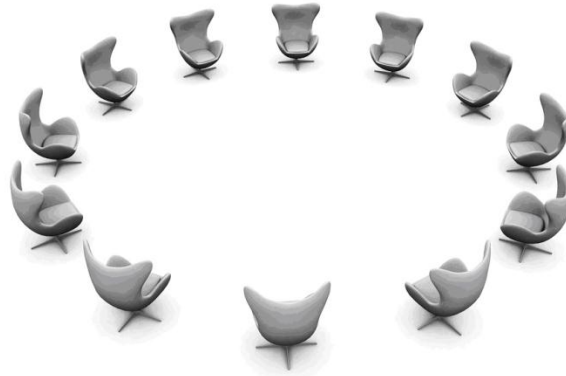
## ► 2012 MAY PAG AGENDA

### Other topics:

- Integration plans for BBEC/BBDM/BBIS – technical and functional integration
- Future road map – BBEC/BBIS points
- Conversion Toolset – Toolset? Experiences? Movement toward a more iterative option?
- Data Warehouse plans and roadmap
- Reporting round table – 2 – 3 folks share reporting solutions? Maybe a workshop ....
- Future plans and experiences with Blackbaud Developer Network
- Moving away from Click Once – User interface and functional migration
- Performance round table – issues and solutions
- Integration plans for recent purchases – Convio, Sphere, others?

# ► **ROUNDTABLE**

Performance Optimization Discussion



**blackbaud**<sup>™</sup>  
your passion > our purpose

# ► SEE YOU IN MAY!

@ the Blackbaud CRM Customer Summit



**blackbaud**<sup>™</sup>  
your passion > our purpose