Solution Overview
For national and international nonprofit organizations

Blackbaud CRM — Bringing industry-leading fundraising, online applications, and direct marketing together in one platform to enable an integrated view of the constituent experience.

Solving the challenges of mid- to large-sized national and international nonprofit organizations.

Virtually every nonprofit faces a variety of daily challenges, such as building relationships with constituents, raising money, acquiring donors, and increasing stewardship. National and international organizations face even greater challenges: inconsistency in brand and constituent experience across functional or geographic areas of their organizations; inefficiencies such as redundant IT infrastructure or the collection, standardization, and aggregation of information across their complex organizations; lack of standard out-of-the-box best practices to support business process; excess time spent by chapters or field offices on managing overhead instead of strengthening local relationships; and focusing on mission delivery.

In addition to these challenges, national and international organizations with multiple sites also need flexible, scalable, and secure constituent relationship management (CRM) solutions that address their unique needs. Only Blackbaud CRM combines Blackbaud’s depth of experience in fundraising with true CRM solutions. The result helps these organizations build and preserve their brands while also building deeper and more personalized relationships with their constituents. It helps them achieve organizational efficiency by providing roll-up reporting while eliminating the duplication of information technology infrastructure, and it enables the success of individual chapters and field offices by allowing them to focus on local mission delivery while standardizing business rules and processes across the entire organization.

Blackbaud CRM brings together disparate information — such as annual and capital giving, gift planning, major giving, and volunteer systems — across the various chapters and programs within an organization. With a single system of record that can be securely and efficiently shared, organizations are able to turn their data into timely, actionable information that maximizes their fundraising efforts, synchronizes campaigns across chapters and field offices, and strengthens relationships with constituents.
Introducing Blackbaud CRM —
The only CRM solution built specifically for national and international organizations looking for a scalable solution to meet their needs

By integrating our deep knowledge of fundraising into Blackbaud CRM, Blackbaud offers the only organization-wide solution that helps nonprofits efficiently manage traditional CRM responsibilities as well as the unique needs and responsibilities inherent in the nonprofit space.

With the introduction of two unique implementation approaches, Blackbaud allows nonprofits to realize the vast power of the platform that scales to the needs of any organization.

- **Blackbaud CRM Enterprise** provides built-in best practices based on our cumulative knowledge of fundraising from more than 24,000 customers. We provide you an implementation style that enables you to hit the ground running. With a preconfigured database, best practice business processes, and a proven technology platform, Blackbaud CRM Enterprise offers a solution to meet your needs while maintaining full flexibility to scale to the custom requirements of your organization.

- **Blackbaud CRM Unlimited** provides a proven platform that gives large federated organizations the ability to maximize the value of built-in best practice guidelines and customization needs of a more complex, distributed data model. With the recent addition of visual workflow and multi-currency, Blackbaud CRM Unlimited provides the best of both worlds: a proven platform to extend to third-party applications, support for a distributed data model to consolidate the view of the constituent, and a fully scalable platform to meet the needs of the most complex organizations.

**The Overall Value of Blackbaud CRM**

Provide true one-to-one constituent relationship management across your entire organization.

- Increase strength of service and value of brand, regardless of channel or functional area of your organization.
- Move donors up giving levels more efficiently and effectively.
- Establish links between functional areas and programs/mission.

Gain significant cost and organizational efficiencies through better utilization of your existing technology and infrastructure.

- Offer shared or hybrid services (hardware, software, IT support).
- Eliminate redundant processes, data, and costs with effective consolidation.
- Standardize processes across the organization.
- Manage globally, including remote employees, regardless of geographic location.
- Use seamless roll-up and drill-down reporting to evaluate and measure performance at varying levels within your organization.
- Enable the individual success of chapters and field offices within your overall organization.
- Provide strategic services and direction across chapters and field offices.

Continued
• Provide chapter-relevant tools and best practices.
• Consolidate overhead to free up organizational areas to focus on their missions.

Blackbaud CRM — Across functional areas

Major giving:
• Track multi-dimensional relationships with constituents across disparate chapters, field offices, departments, and programs.
• Easily manage complex and multiple giving vehicles through customized workflows based on gift vehicle or pledge amount.
• Manage membership and community support.
• Manage multiple fundraising teams.
• Oversee your donor cultivation and lifecycle management.
• Manage robust household and group giving by creating plans and tracking actions for groups of constituents, including families, foundations, corporations, and key individuals.
• Use automated business rules to determine constituencies and fully understand those relationships with your organization.
• Increase annual fundraising with sophisticated segmentation and more relevant appeals.

Marketing and fundraising:
• Blackbaud Direct Marketing™ provides full marketing campaign lifecycle support, including:
  • Budgeting and planning
  • Analysis and segmentation
  • Campaign execution
  • Measurement and reporting
• Support multiple channels for your marketing and communications.
• Manage events as well as their associated sub events.
• Manage events from a local, regional, or national perspective.
• Benefit from complete annual fundraising campaign support — from identification through segmentation and messaging.
• Use multiple acknowledgement coordination and workflow processes across chapters, field offices, departments, and programs.
• Get a single system of record that supports all methods of fundraising, including online giving, annual fund, direct mail, event fundraising, major and planned giving, recurring giving, and membership.

Core and operational:

• Use organizational reporting and data analyses with key fundraising metrics.

• Support multiple chapters, field offices, departments, and programs.

• Tailor the application to your organization’s unique business rules and processes. Tailor the end-user experience to support your own organizational and individual user needs.

• Get strong reporting, including ad-hoc reporting, that respects security.

• Establish organizational benchmarking, giving you the ability to baseline chapter performance and allow chapter comparisons to find areas of best practices as well as areas that need improvement.

Programs and mission:

• Integrate critical program data with functional information across your organization.

• Use advanced endowment management features that empower you to communicate investment performance, revenues, and expenses on individual endowments.

• Communicate named endowment performance, including earnings and distributions.

• Assure stewardship with a flexible solution that exceeds typical supporter/stewardship needs.

• Integrate data from other mission-critical systems using our open-standards technology.

• Build out mission support functionality on the platform and integrate it with the rest of your organization to complete the 360-degree view of the constituent, bringing you even closer to your constituents.

Human capital:

• Easily solicit, track, and manage volunteer time.

• Reduce training needs with an easy-to-use, role-based interface.

• Manage individual and team performance using key performance indicators (KPIs).

• Use customizable courseware and online help tailored to your organization’s unique business processes and workflow.

Prospect research and analytics

Target Analytics®, a Blackbaud company, provides the only comprehensive solution to help you replenish your donor pool, identify your best prospects, assess donor performance, compare how you measure up against your peers — and make sure your information is as accurate as possible.
• Services include:
  • Donor acquisition and development
  • Donor performance and benchmarking
  • Prospect research
  • Data enrichment
• Identify and retain donors through accurate, current acquisition list information and our cooperative database.
• Custom modeling helps identify your best prospects based on wealth and propensity to give to your specific organization.
• Get the most comprehensive, up-to-date accumulation of charitable giving data on the Internet today — all at your fingertips.
• Enable evaluation of your organization’s year-over-year strategies based on both internal and peer-to-peer comparisons.
• Reduce time by eliminating bad information associated with your growing data pool by ensuring your addresses, emails, phone numbers, etc. are accurate and get to their intended recipients.

Blackbaud Infinity™

Blackbaud Infinity provides large nonprofit organizations a state-of-the-art technology platform that enables them to improve their relationships with constituents, boost efficiency, and raise more mission-critical funds. Hallmarks of the new platform include flexibility, scalability, and new levels in IT security within a solution that can accept customizations and has a real upgrade path.

Flexibility:
• Implement your organization’s business rules to enforce standardized policies and procedures.
• Roll out the solution at your own speed — one office or chapter at a time, or across the organization at once.

Scalability:
• Take advantage of a world-class enterprise platform designed for speed and scale.

Security:
• Assign rights and privileges for sharing or restricting information between departmental and functional areas.
• Get role-based access control for individual functions.

International support:
• Get foreign language and multi-currency support.

Continued
Smart client Web delivery:

- Get a 100% Web-deployed application.
- Expand your reach to your entire organization (multiple chapters and field offices, remote development officers working from home, etc.).
- Decrease demands for IT support (there is no need to install or update machines the traditional way).

Integration:

- Use an open-standards technology platform.
- Benefit from the Web services model.

Comprehensive auditing:

- Get accountability and historical perspective for troubleshooting and system roll-back.

Future-proofed technology investment:

- Standards-based technology provides the ability to upgrade as the technology changes.

Workflow:

- Best practice workflows leveraging visual studio assets bring you the business process workflows you need, right at your desktop.

The Blackbaud Difference

No one understands the complex relationships between large nonprofit organizations and their constituents like Blackbaud. Our solution provides a true enterprise advancement system that incorporates best practices in fundraising and can be further tailored to meet the specific business processes and procedures of your organization. It can help your organization manage constituent relationships efficiently while maximizing the value and impact of those relationships.

By partnering with Blackbaud, your institution will enter into a long-term relationship with a market leader that has 30 years of experience in the nonprofit space and can help maximize the value of your constituents.

About Blackbaud

Blackbaud is the leading global provider of software and services designed specifically for nonprofit organizations, enabling them to improve operational efficiency, build strong relationships, and raise more money to support their missions. Approximately 24,000 organizations — including The American Red Cross, Cancer Research UK, Earthjustice, International Fund for Animal Welfare, Lincoln Center, The Salvation Army, The Taft School, Tulsa Community Foundation, Ursinus College, the WGBH Educational Foundation, and Yale University — use one or more Blackbaud products and services for fundraising, constituent relationship management, financial management, website management, direct marketing, education administration, ticketing, business intelligence, prospect research, consulting, and analytics. Since 1981, Blackbaud’s sole focus and expertise has been partnering with nonprofits and providing them the solutions they need to make a difference in their local communities and worldwide. Headquartered in the United States, Blackbaud also has operations in Australia, Canada, Hong Kong, the Netherlands, and the United Kingdom. For more information, visit www.blackbaud.com.

© June 2011. Blackbaud, Inc. This solution overview is for informational purposes only. Blackbaud makes no warranties, expressed or implied, in this summary. The information contained in this document represents the current view of Blackbaud, Inc., on the items discussed as of the date of this publication.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. The names of actual companies and products appearing herein may be the trademarks of their respective owners.

To learn more about Blackbaud CRM™, visit http://www.blackbaud.com/enterprisecrm or contact your Blackbaud account representative.