ACTION TRACKS
Kick-starting your Capital Campaign

Tuesday, February 23, 2010
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Agenda

- Welcome and Introductions
- Action Tracks Presentation
- Q & A
- Thank You!
Action Tracks: Kick-start your Capital Campaign!

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Solutions Engineer/ Product Expert
ACTION TRACKS

1. Resources
2. What is an Action?
3. How to Access Actions?
4. Anatomy of an Action Record
5. Action Reminder Panel
6. Action User Options
7. Configuring RE7 to talk to MS Outlook for Action Reminders
8. What is an Action Track?
9. Why use Action Tracks
   - How to create and use Action Tracks
10. Action Reports
11. Thank You and Questions!
1. Resources:

1. **User Guides** are accessed from within the software by selecting Help, User Guides:
   - **Constituent Data Entry Guide** – step by step instructions with real-life examples on how to effectively utilize Actions & Action Tracks. These guides are useful when you need in-depth information about a specific area of the program. You can view guides on your computer, or you can print selected pages or entire guides.

2. **Help Files** are designed to give you quick answers; it contains a table of contents, index, and search features that enable you to find information about all areas of *The Raiser’s Edge* from a single location. To access the help file:
   - Select **Help, The Raiser’s Edge Help Topics** from the menu bar
   - You can also access the most recent pdfs of the user guides from [www.blackbaud.com](http://www.blackbaud.com). Click **Support, User Guides** or **Help, User Guides** from within the software.

3. **Knowledgebase (helpful tips)**
   - BB134342 – What is an Action?
   - BB18724 – What are Action Tracks and how to create them?
   - BB386506 – How to add independent actions to an action track
2. What is an Action?

In *The Raiser’s Edge*, actions are specific steps you take toward securing a donation from a constituent. Actions can include meetings, mailings, telephone calls, email messages, and advocacy. Using actions, you can build a history of contacts and communication involved in creating a successful relationship with a constituent. In addition to tracking meetings, phone calls, and mailings, *The Raiser’s Edge* can automatically remind you days, weeks, or months before an action is scheduled to occur. You can also link action records together into an action track, which is a sequence of related actions. Action tracks help you with your moves management strategies.

**Why use Actions?**

- Establish “To-Do” Lists
- Delegate tasks to staff members
- Set up automatic reminders in RE7 and MS Outlook
- Run detailed reports on all activity!

**Action Types**

- Constituent
- Event
- Appeal
3. How to Access Action Action Records

- Home Page
- Records Section
4. Anatomy of an Action Record

Let’s take a look!
5. Action Reminder Panel (Home Page)

- Home Tab (Tools, User Options)
- When you open *The Raiser’s Edge*, you are automatically reminded of your actions on the Home page.
- Action Reminders can also be configured to appear in MS Outlook!
6. Action User Options

On the Records tab of User Options, for Action records, you can mark the **Prompt for follow-up** checkbox. The program will then ask if you want to add a follow-up action when you mark an action as completed. On the Home tab of User Options, we recommend you set up a panel to show constituent, event, and appeal action reminders on your Home page.
7. Configuring RE7 to talk to MS Outlook for reminders

- Select Admin, Security, Users
- In the “Outlook User” field, enter the name as it appears in MS Outlook
8. What is an Action Track?

- An action track is a predefined sequence or series of actions assigned to a constituent, event, or appeal record.
- Tracks are usually a combination of independent and dependent actions.
- The creation of dependent actions is based on the completion of a previous independent action.
- Tracks simulate a hierarchal process or checklist for a constituent, event, or appeal.
- You can effectively use action tracks as part of your moves management strategies.
9. Why use Action Tracks?

- Streamline cultivation of new donors
- Keep up with current donors
- Consistent fundraising approach for common segments
- Manage communication
- Eliminate manpower of creating individual actions
Action Tracks Defined

- Predefined set of actions assigned to constituent, event, or appeal record
- “Check list”
- Composed of independent and dependent actions
  - Independent added individually to record
  - Dependent added by change in previous action
Examples of Action Tracks

Stewardship: Constituent makes a major gift, therefore…
1. Send thank you letter from assigned solicitor
2. One week following thank you letter, phone call
3. Call or visit six months after thank you letter

Volunteer Coordination: Constituent expresses interest in volunteering, therefore…
1. Information packet sent to prospective volunteer
2. One week following, phone call to schedule training
3. Training for volunteer
ABC’s of Constituent Action Tracks

- Action Queries for dependent actions
- Build the Track
- Constituent assignment
Action Queries

Before we begin, we want to create Action Queries for our dependent actions – Ex: Action Query that only looks at completed actions

Criteria: Action Information
> Completed equals Yes
Build the Track

- Access Action Tracks from the main Raiser’s Edge shell
- Tools > Action Tracks > Define Action Tracks
Build the Track

- Select to Show tracks for Constituents, Events, or Appeals
- Select New
- Enter Track name
Build the Track: Define Constituent Action Track

- To add a new action to the track, select “New”
- New Action appears
Build the Track: Create Action

- Choose the appropriate Category
- Complete the individual Action
**Build the Track: Add Independent Action to Track**

- Save the Action – adds to Track
Build the Track: Setting Conditions

Each subsequent action is dependent upon specified conditions – For example: Completing the prior action.
Build the Track: Setting Conditions

Prior action automatically populates in the Based On field.

Generic Action query selected.

3 Options for the date of the action.
Build the Track: Action Date

- Use date action is created
- Use ___ from date action is created
  - Define a specific period of time in days, weeks, or months following the date action is created
- Use ___ from date of [prior action]
  - Define a specific period of time in days, weeks, or months following the preceding action
Build the Track: Additional Options

- **Attributes**
  - Qualities, characteristics, and preferences associated with the action

- **Notes**
  - Records to remind you of specifics about action
Note: “Based on” action defaults to prior action, but can be changed.
Subsequent Actions (cont’d)

- Ex: 3rd action should occur 6 months after 1st action
Subsequent Actions (cont’d)

- Click binoculars to choose correct action
Build the Track: Saving the Finished Track

New Action Track is now listed with other available tracks of that type.
Constituent Assignment

- To assign Action Track to records:
  - Select Tools > Action Tracks > Assign [Constituent / Event / Appeal] Action Tracks
Assign Track Wizard: Step 1

- Select the track to be assigned
- Can assign to one or group of constituents
  - Based on constituent, individual, or organization query
Assign Track Wizard: Step 2

- Choose starting action and date
Assign Track Wizard: Step 3

- Final Options:
  - Preview list of actions
  - Assign track to same constituent(s)
  - Link to proposal

Link to Proposal: Use binoculars to search for existing proposal
Assign Track Wizard: Complete!

- After selecting parameters, click “Assign Now”
- If assigned successfully, confirmation message appears
- Option to preview Control Report
The Track in Action

- Open constituent record > Select Actions tab
- First action appears on constituent record
The Track in Action (cont’d)

- Mark “Action completed on” and enter date
The Track in Action (cont’d)

- This causes the subsequent action(s) to appear on record
10. Action Reports

- **Action Detail Report** – generates detailed information about selected or all actions in your database. This report is a great tool for tracking the effectiveness of your actions.

- **Action Summary Report** – generates a list of action categories entered in your database along with a count of constituents associated with each action category. Because this report is a summary, constituent names do not appear. The report simply lists all your action categories with the total number of constituents associated with each.

- **Tickler Report** – helps you keep track of the individuals responsible for the actions in your database. This report can be arranged based on solicitors or other users notified about an action. This report can include constituent or contact names, action start and end times, action types, the status of each action type, action priorities, action progress, and proposal information.

- **Proposal Follow-Up Report** - tracks actions taken after you present a proposal. The report can include the status and priority of the proposal. (only available with RE: Search module)
Questions?

For more information or additional training opportunities:

Contact your account manager

Phone: 800-443-9441

Email:

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Thank You for joining us!