RESEARCHPOINT 2.95
NEW FEATURES WEBINAR
HOUSEKEEPING: YOUR HOST

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HOUSEKEEPING: Q&A

We have allotted time at the end of our session for questions. You may submit your questions to our Product Support Lead, Anthony Pisano.

To submit a question to Anthony:

1) Move your mouse cursor to the top of the screen, and wait for the menu to appear
2) Click on the chat icon
3) Type your question
4) Select to send to Anthony in the drop-down menu
AGENDA

• New features and improvements
• Tour of changes in a ResearchPoint database
• Q&A
• Resources and Training Options
WEBSHELL NAVIGATION
ONE STOP SEARCH

Advanced search options are accessible and intuitive
TARGET ANALYTICS PROSPECTING DATABASE

- Change the order of results to sort by name, wealth, or location.
- Add your new prospect to ResearchPoint, including the wealth data.
- View details about individual real estate or business listings.
CONTINUING TO SIMPLIFY THE USER’S EXPERIENCE

Managing the Wealth Record is continually being improved, based on your feedback:

- Improved display for multiple areas to make analysis easier:
  • Visuals improved with platform changes
  • Displaying key information clearly and at first glance
  • Enabled Shortcuts to make navigation easier
- Improved NOZA philanthropic gift matching helps you spend less time confirming gift records
- Wealth Capacity formula will provide a consistent estimate of wealth across the individual’s record
VISUAL IMPROVEMENTS MAKE NAVIGATION EASIER

Wealth Summary

<table>
<thead>
<tr>
<th>Total identified</th>
<th>Confirmed</th>
<th>Other indicators</th>
<th>Total identified</th>
<th>Confirmed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real estate:</td>
<td>$18,557,206</td>
<td>$24,208,000</td>
<td>Wealth indicators:</td>
<td>6</td>
</tr>
<tr>
<td>Businesses:</td>
<td>$24,208,000</td>
<td>$24,208,000</td>
<td>Biographical data:</td>
<td>4</td>
</tr>
<tr>
<td>Securities:</td>
<td>$0</td>
<td>$0</td>
<td>Political donations:</td>
<td>213</td>
</tr>
<tr>
<td>Income/compensation:</td>
<td>$4,301,371</td>
<td>$4,301,371</td>
<td>Philanthropic gifts:</td>
<td>228</td>
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<tr>
<td>Other assets:</td>
<td></td>
<td></td>
<td>Nonprofit affiliations:</td>
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</tr>
<tr>
<td>Total assets:</td>
<td>$47,066,577</td>
<td>$28,509,371</td>
<td>Foundation affiliations:</td>
<td>1</td>
</tr>
</tbody>
</table>

Giving capacity (System)

- Capacity formula: 5% of confirmed assets
- Estimated wealth: $10,000,001 and up ($28,509,371)
- Major giving capacity: $1,000,001 and up ($1,425,468)

Asset distribution for Michael Dell

- Real Estate
- Businesses
- Securities
- Income/Compensation
- Other Assets

Tabs are more prevalent. Headers are clearly defined.
EASILY SEE IF YOU HAVE UPDATED DATA

The **NEW** status goes away after you take an action or navigate to that area.

For example, navigating to the Assets tab would clear **NEW** status on Real Estate, Securities, Businesses, etc.
**SEcurities NOW SHOW INDIRECT VS. DIRECT HOLDINGS**

THEN – In 2.94, the quick view of securities showed Relationship and Total Value, but you couldn’t easily see which securities were Direct vs. Indirect.

![Table of Securities]

NOW – In 2.95, we replaced Relationship with Direct and Indirect Values – you will still see relationship when you expand the details, but the values are more important to see at first glance.

![Table of Securities with Direct and Indirect Values]
ESTIMATED WEALTH AND MAJOR GIVING CAPACITY VALUES ARE EASIER TO VIEW NOW

Version 2.94 required clicking Edit to view the specific values for Estimated Wealth and Major Giving Capacity.

In version 2.95, these values now display right next to their ranges.
WHICH REAL ESTATE VALUE IS USED TO CALCULATE THE PROPERTY VALUATION?

- If Property Estimate is not blank and the Estimate Confidence is greater than or equal to 70%, the Property Estimate is used as the Property Valuation.
- If Property Estimate is blank OR the Estimate Confidence is less than 70%, use the first non-blank* value in this hierarchy:
  1) Assessor Market Value
  2) Assessed Value
  3) Sales Price
  4) Mortgage 1 Loan Amount

*If all four values are blank, Property Valuation defaults to the Property Estimate, regardless of Estimate Confidence percentage.
UPDATED WEALTH CAPACITY FORMULA TO USE “PROPERTY VALUATION” AS THE DEFAULT VALUE

• Value to use in calculation – use largest of “Property Valuation”
  - We unchecked property value estimate.

• Wealth capacity formula now matches up with the Target Analytics method for determining real estate value.
  - More consistent, and more conservative.

• Things to know:
  - We did recalculate the capacities already on your records. You can easily reapply the new formula to single records or groups of records, as you wish. Forcing the recalculation would have introduced great risk in upgrade process.
  - New searches will use new formula automatically.
  - Adding new, custom formulas will default to only use Property valuation, as well.
IMPROVED NOZA GIFT MATCHING, LESS WORK CONFIRMING RESULTS!
SHORTCUTS MAKE WORK EASY. USERS CAN CUSTOMIZE TO SEE WHAT’S IMPORTANT TO THEM

- Shortcuts display in the Explorer bar on the left side of your screen.
- You can add ANY page as a shortcut.
  - This includes specific prospects, queries, research groups, or even major tasks.

Hover over a link to add it to your shortcuts or manage your list of shortcuts.
CAN MANAGE SHORTCUTS FROM ANY PAGE

Change the order, rename, or email your links easily by clicking on **Manage my shortcuts**.
OTHER IMPROVEMENTS

• Records are easier to open from Search results now. You don’t have to click the View RP link. Just click anywhere on that search result to open the record.

• We’ve added the ability to see how many TA Prospecting Database searches your organization has used in the same area where you check your WealthPoint subscription.
DEVELOPMENT OFFICERS CAN NOW ACCESS MODEL SCORE AND RATINGS PRESENTATIONS

Prospects

Prospect research
- Search
- Manage research groups
- Add a prospect research request
- My prospect research page

Research tools
- Find external properties and businesses
- Mapping
- Constituent density map
- Prospect analysis
- Manage model scores and ratings
- Target Analytics model scores and ratings results

• Access to your Target Analytics data project has never been easier— we will load the data and delivery presentations directly into ResearchPoint.
MODEL SCORE INFORMATION ADDED TO QUERY AND KEY REPORTS

- Modeling added to Prospect Research and Research Group Reports
- Users can now leverage the flexibility of query to pull model information the way they want.

<table>
<thead>
<tr>
<th>Model Scores and Ratings</th>
<th>Score</th>
<th>Maximum score</th>
<th>Updated on</th>
<th>Origin</th>
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</thead>
<tbody>
<tr>
<td>Annual Gift</td>
<td>123</td>
<td></td>
<td>10/18/2012</td>
<td>Custom</td>
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<tr>
<td>Annual Giving Likelihood</td>
<td>100</td>
<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
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<tr>
<td>Annuity Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
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<tr>
<td>Bequest Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>CRT Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Major Giving Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Membership Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
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<tr>
<td>Online Giving Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Patient Response Likelihood</td>
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<td>1000</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
<tr>
<td>Planned Giving Likelihood</td>
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<td>1000</td>
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<td>Blackbaud</td>
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<tr>
<td>Suggested Membership Level</td>
<td>850-1000</td>
<td>$1,000,002 plus</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
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<td>Target Gift Range</td>
<td>52-550</td>
<td>$1,000,002 plus</td>
<td>10/18/2012</td>
<td>Blackbaud</td>
</tr>
</tbody>
</table>
STILL HAVE QUESTIONS?
YOUR RESEARCHPOINT LAUNCH PAGE CAN HELP!

1. Sign up for a training class with a live instructor.
2. Check out our improved user guides.
3. View quick videos and notes about recent changes.
4. Search our Knowledgebase of frequently asked questions.
5. Create a case to work with Support.
How to Register for ResearchPoint Distance Learning Classes
SEARCH FOR TRAINING ON BLACKBAUD.COM

Blackbaud is the leading provider of nonprofit software and services. Take a look around and find out why.

Start Your 2013 Fundraising Now!
Capitalize on your year-end momentum with 10 simple steps that can make a big difference.

Identify Your Best Prospects
Build a winning fundraising strategy that is data driven — try our new Modeling Explorer!

The Blackbaud Index
The most up-to-date charitable giving data

Overall Giving
1.7%
November 2012

Online Giving
13.3%
November 2012
Find the Best Classes for You

Welcome Amanda to Training Central!

Let’s Get Started

Search for a training event or video by product, location, or date. Or try the keyword search for specific tasks and activities.

Search Now

Chat with an Expert
Discuss your training needs, learn about recommended classes, and how to buy.

Overview Video
Get started with an overview of Training Central. Learn how to search, browse the calendar, and more!

Free Video Tutorials
Get just-in-time video instruction for tasks you are completing right now.

Featured Curriculum
ResearchPoint
Ready? Set? Schedule!

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ResearchPoint: Administrative Essentials  WebEx-Training | $150.00
This one-hour instructor-led distance learning class focuses on assigning user rights and defining code table entries in ResearchPoint. Through instructor-led scenarios and class discussion, participants learn how to align program rights with job responsibilities as well as set data entry rules for code tables. After taking this class, participants will be able to adopt an institutional standard for user permissions and consistent data entry in ResearchPoint.

ResearchPoint: Advanced Importing Techniques  WebEx-Training | $300.00
This two-hour instructor-led distance learning course introduces participants to techniques used to complete complex imports in ResearchPoint. Through instructor-led scenarios and discussion, participants learn to identify requirements for batch templates, validate and commit records, and update data for large groups of records. After taking this class, participants will be able to create an import file to add detailed prospect information and relationships using the Batch and Import functions.

ResearchPoint: Advanced Query Techniques  WebEx-Training | $300.00
This two-hour instructor-led distance learning class focuses on creating queries with multiple criteria. Through instructor-led scenarios and class discussion, participants learn how to use combining operators and parentheses to define queries with multiple criteria within ResearchPoint. After taking this class, participants will be able to create complex queries to group prospect records.

ResearchPoint: Essentials  WebEx-Training | $300.00
This two-hour instructor-led distance learning class covers the fundamentals of using ResearchPoint as a prospect management tool. Through instructor-led scenarios and class discussion, participants learn to perform basic data entry, screen individuals for wealth, and review prospect records in ResearchPoint. After taking this class, you will be able to navigate in ResearchPoint and effectively manage prospect records.

ResearchPoint: Exporting Prospect Data  WebEx-Training | $160.00
This one-hour instructor-led distance learning class covers using Export to extract prospect information from ResearchPoint. Through instructor-led scenarios and class discussion, participants learn to prepare query output, create an export process, and extract information from ResearchPoint to Microsoft Excel. After taking this class, you will be able to prepare lists of individuals and extract the information from your database.