



### COURSE TYPE

---

» Technology

### MODALITY

---

» Instructor-Led Event

### DURATION

---

» 3 Hours

### DELIVERY METHOD

---

» Online

» Onsite

### PREREQUISITES

---

» Blackbaud CRM: Fundamentals

### COURSE OVERVIEW

Learn how to use the tools available within Blackbaud CRM to effectively communicate your mission to donors and prospects, generate revenue, and cultivate existing relationships with constituents. Plan, execute, manage, and report on direct marketing efforts through email sent directly from within the CRM application.

### TARGET AUDIENCE

This course is designed for those responsible for running direct marketing programs within their organization, such as marketing managers or communications officers.

### LEARNING OBJECTIVES


- View a marketing effort on a constituent record
- Define Appeals versus Marketing Efforts in CRM
- Navigate a Plan record
- Change a Plan into a Marketing Effort
- Preview email communications templates
- Define source codes, finder number settings, seeds, and ask ladders
- Define and manage acquisition lists
- Build selections and segments
- Create a direct marketing email effort
- Activate a direct marketing effort
- Export a direct marketing effort
- Add and import a finder file
- Generate marketing effort and appeal reports
- Run Revenue reports

### VIEW ADDITIONAL INFORMATION

- [Registration information](#)
- [Blackbaud University policies](#)
- [View the complete curriculum for Blackbaud CRM](#)

[LEARN MORE ABOUT BLACKBAUD UNIVERSITY](#)

 USA 1.800.468.8996 opt. 3

 UK +44(0) 141.243.4250

 [www.blackbaud.com/training](http://www.blackbaud.com/training)

This Course Abstract is for informational purposes only. Blackbaud makes no warranties, express 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 product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. © 2019 Blackbaud, Inc.