



COURSE TYPE

- » Technology

MODALITY

- » Instructor-Led Event

DURATION

- » 3 Hours

DELIVERY METHOD

- » Online
- » Onsite

PREREQUISITES

- » Blackbaud CRM: Fundamentals
- » Blackbaud CRM: Constituent Management

COURSE OVERVIEW

Join us for this instructor-led event, which discusses Prospect Management in Blackbaud CRM. The prospect management features enable fundraisers to more fully develop relationships with their constituents, who have the potential to make a cultivated gift to their organization. In this session, participants learn how to manage prospects in Blackbaud CRM.

TARGET AUDIENCE

This course is designed for those responsible for any aspects of Prospect Management at their organization, such as gift officers, prospect management team, and Directors of Development.

LEARNING OBJECTIVES

- Navigate the My Fundraiser page
- Search for a Prospect
- Add a Prospect
- Navigate the Prospect tab
- Submit Prospect Research Requests
- Navigate the prospect's Wealth and Ratings page
- Assign a Prospect to a Fundraiser
- Create and modify Prospect Plans
- Manage Plan Steps from the My Fundraiser page
- File Contact reports
- Add and manage an Opportunity record

VIEW ADDITIONAL INFORMATION

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