



### COURSE TYPE

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- » Technology

### MODALITY

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- » Instructor-Led Event

### DURATION

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- » 3 Hours

### DELIVERY METHOD

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- » Online
- » Onsite

### PREREQUISITES

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- » Blackbaud CRM: Fundamentals
- » Blackbaud CRM: Constituent Management
- » Blackbaud CRM: Prospect Management 1

### COURSE OVERVIEW

Join us for this instructor-led classroom event that looks more deeply at solicitation, stewardship, and reporting. This course enables participants to continue building essential relationships and further the prospect management cycle.

### 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

- Review the purpose and contents of an Opportunity record
- Edit and complete an Opportunity record at the point of Solicitation
- Prepare the Opportunity to receive revenue, following Acceptance
- Discuss stewardship of cultivated gifts by Fundraisers
- Write a one-off letter to a constituent
- View Opportunities and Asks
- Run the Opportunity pipeline report
- Run the Prospect plan analysis report

### VIEW ADDITIONAL INFORMATION

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



 USA 1.800.468.8996 opt. 3  
 UK +44(0) 141.243.4250  
 [www.blackbaud.com/training](http://www.blackbaud.com/training)

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