BLACKBAUD CRM™

Sponsorship

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 to introduce users to sponsorship capabilities within Blackbaud CRM. A sponsorship is a relationship between a sponsor and a person or project that receives sponsored support. In this course, participants learn how to use the sponsorship functionality in Blackbaud CRM to manage all aspects of their organization's sponsorship programs.

TARGET AUDIENCE

This course is designed for those responsible for managing sponsorship programs, such as sponsorship coordinators, donor relations teams, and programs teams.

LEARNING OBJECTIVES

- Define sponsorships in Blackbaud CRM
- Search for and add a Child record
- Search for and add a project
- Tour the Opportunity page
- Discuss Opportunity attributes
- Mark Child and Project records ineligible and closed
- Discuss the Sponsor constituency
- Search for an existing sponsor and sponsorship
- Add a sponsorship individually and in bulk
- Add a gift of sponsorship
- Track sponsorships from sponsor
- Add a sponsorship to an existing sponsor record
- Reassign, transfer, and cancel a sponsorship from a sponsor
- Discuss workflow for sponsorship payments
- Add a sponsorship payment
- View overdue, past due, and under payments
- Track Sponsorship upgrades and downgrades
- Demonstrate how to adjust Sponsorship rates
- Discuss and generate Sponsorship reports

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www.blackbaud.com/training

LEARN MORE ABOUT BLACKBAUD UNIVERSITY

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VIEW ADDITIONAL INFORMATION

- Registration information
- Blackbaud University policies
- View the complete curriculum for Blackbaud CRM

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