



## *BLACKBAUD CRM™: WEALTH AND RATINGS*

### *MODALITY*

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- » Instructor-Led Event

### *DURATION*

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- » 1.5 Hours

### *DELIVERY METHOD*

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- » On-Site

### *PREREQUISITES*

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- » Blackbaud CRM: Prospect Management 1

### *COURSE OVERVIEW*

This instructor-led learning event teaches students about the Wealth and Ratings view in Blackbaud CRM. Participants learn how to screen records for wealth, confirm and reject wealth data, query on wealth information, build and manage research lists, and manage wealth capacity formulas.

### *TARGET AUDIENCE*

This course is designed for those responsible for prospect research at their organization. Users with foundational knowledge of navigation, records, and prospect management will benefit from this course.

### *LEARNING OBJECTIVES*

- Search the external prospecting database
- Identify data sources
- Wealth screen individuals and groups
- Review wealth data
- Define confidence levels
- Query based on wealth data
- Create research lists
- Manage records in research lists
- Manage wealth capacity formulas

**For additional information, visit [www.blackbaud.com/training](http://www.blackbaud.com/training)**