



COURSE TYPE

- » Technology

MODALITY

- » Instructor-Led Event

DURATION

- » 3 Hours

DELIVERY METHOD

- » Online
- » Onsite

PREREQUISITES

- » Blackbaud CRM: Core Principles 1
- » Blackbaud CRM: Core Principles 2

COURSE OVERVIEW

The purpose of this course is to familiarize users with the processes and workflows around communication with constituents and groups of constituents. Further, this course provides insight into the most commonly used types of communication within Blackbaud CRM such as: sending tribute letters to acknowledgees to notify them that a donation has been made for a tribute; and generating receipts and pledge reminders for constituents.

TARGET AUDIENCE

This course is designed for those responsible for communicating marketing efforts to constituents. Users with little to no experience will benefit from this course.

LEARNING OBJECTIVES

- Describe the process to write a letter
- Write a letter to a constituent
- Describe the general correspondence process
- Create a general correspondence using mail merge in Microsoft Word®
- Generate revenue acknowledgements
- Generate tribute acknowledgements
- Add an import process
- Describe the process to write a pledge reminder
- Write a pledge reminder to a constituent
- Describe the process to generate receipts
- Create a receipt process

VIEW ADDITIONAL INFORMATION

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