



COURSE TYPE

- » Technology

MODALITY

- » Instructor-Led Event

DURATION

- » 3 Hours

DELIVERY METHOD

- » Online
- » Onsite

PREREQUISITES

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

COURSE OVERVIEW

Join us for this instructor-led learning event that teaches students how to utilize all aspects of Prospect Management, including prospect research within Blackbaud CRM. In this session, participants learn how to manage major giving prospects in Blackbaud CRM in line with the various stages of the prospect management process, from identification to stewardship.

TARGET AUDIENCE

This course is designed for those responsible for any aspects of Prospect Management at their organization. Users with foundation knowledge of records and system navigation and basic understanding of Prospect Management will benefit from this course.

LEARNING OBJECTIVES

- Add Prospect records
- Navigate the Prospect tab
- Create and modify Prospect Plans
- File Contact Reports
- Navigate Fundraiser pages and tabs
- Submit Prospect Research Requests
- Navigate the Major Giving Management area
- Read Planned Gift records
- Add and manage Prospect Research Requests
- Map Prospects

VIEW ADDITIONAL INFORMATION

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