BLACKBAUD CRM™

Stewardship Programs

COURSE TYPE

» Technology

MODALITY

» Instructor-Led Event

DURATION

» 1.5 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 use various features in Blackbaud CRM to steward donors after sending in a gift. This course covers how to create and manage stewardship plans. Students will learn how to create and manage naming opportunities, and we'll wrap up by demonstrating how to set up and manage recognition programs, including setting up various recognition levels.

TARGET AUDIENCE

This course is designed for those responsible for capturing and managing constituent giving. Users with familiarity of navigation, record types, and basic data entry will benefit from this class.

LEARNING OBJECTIVES

- Add a stewardship plan to a constituent record
- Access stewardship plans on the Prospect tab
- Add steps to a stewardship plan
- Add a recognition program
- Add levels to the recognition program
- Assign recognition to constituents
- Add and run a recognition process
- View recognition information on a constituent record
- Add a naming opportunity
- Add a naming opportunity to a prospect opportunity
- Navigate the naming opportunity record
- Add a naming opportunity recognition
- Navigate the naming opportunity recognition record

VIEW ADDITIONAL INFORMATION

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

LEARN MORE ABOUT BLACKBAUD UNIVERSITY