

Blackbaud CRM

Bringing industry-leading fundraising solutions to customer relationship management



The challenge of large national and international not-for-profit organisations

Virtually every not-for-profit faces myriad daily challenges, such as building relationships with customers, raising money, and increasing stewardship. But large national and international organisations face even greater challenges: inconsistency in brand and customer experience across functional or geographic areas of the organisation; inefficiencies such as redundant IT infrastructure or collecting, standardising, and aggregating information across complex systems; chapters or field offices spending too much time on managing overhead instead of strengthening local relationships; and focusing on mission delivery.

In addition to these challenges, national and international organisations with multiple sites also need flexible, scalable, and secure customer relationship management (CRM) solutions that address their unique needs.

Only **Blackbaud CRM** combines Blackbaud's depth of experience in fundraising with true enterprise CRM solutions. The result helps these large organisations build and preserve their brands while also building deeper and more personalised relationships with their customers. It helps them achieve organisational efficiency by providing roll-up reporting while eliminating the duplication of information technology infrastructure. It enables the success of individual chapters and field offices by allowing them to focus on local mission delivery while standardising business rules and processes across the entire organisation.

Blackbaud CRM brings together disparate information — such as annual and capital giving, gift planning, major giving, and volunteer systems — across the various chapters and programs within an organisation. With a single system of record that can be securely and efficiently shared, organisations are able to turn their data into timely, actionable information that maximises their fundraising efforts, synchronises campaigns across chapters and field offices, and strengthens relationships with customers.

Get started today!

To learn more about Blackbaud CRM, visit www.blackbaud.com/enterprisecrm or contact your Blackbaud account representative.

Introducing Blackbaud CRM – The only CRM solution built specifically for large national and international organisations

By integrating our deep knowledge of fundraising into Blackbaud CRM, Blackbaud offers the only organisation-wide solution that helps large organisations efficiently manage traditional CRM responsibilities, as well as the unique needs and responsibilities inherent in the not-for-profit space.

The Overall Value of Blackbaud CRM

Provide true one-to-one customer relationship management across your entire organisation.

- Increase strength of service and value of brand regardless of channel or functional area of your organisation.
- Move donors up giving levels more efficiently and effectively.
- Establish links between functional areas and programs/mission.

Gain significant cost and organisational efficiencies through better utilisation of your existing technology and infrastructure.

- Offer shared or hybrid services, such as hardware, software, and IT support.
- Eliminate redundant processes, data, and costs with effective consolidation.
- Standardise processes across the organisation.
- Manage globally, including remote employees, regardless of geographic location.
- Use seamless roll-up and drill-down reporting to evaluate and measure performance at varying levels within your organisation.

Enable the individual success of chapters and field offices within your overall organisation.

- Provide strategic services and direction across chapters and field offices.
- Provide chapter-relevant tools and best practices.
- Consolidate overhead to free up organisational areas to focus on their missions.

Blackbaud CRM across functional areas

Major giving

- Track multi-dimensional relationships with major supporters across disparate branches, field offices, departments, and programmes.
- Easily manage complex and multiple giving vehicles through customised workflows based on gift vehicle or pledge amount.
- Manage membership and community support.
- Manage multiple fundraising teams.
- Oversee your donor cultivation and life-cycle management.



- Manage robust household and group giving by creating plans and tracking actions for groups of customers, including families, foundations, corporations, and key individuals.
- Use automated business rules to determine regions and fully understand those relationships with your organisation.
- Increase annual fundraising with sophisticated segmentation and more relevant appeals.



Marketing and Fundraising

- Blackbaud Direct Marketing™ provides full marketing campaign life-cycle support, including:
 - Budgeting and planning
 - Analysis and segmentation
 - Campaign execution
 - Measurement and reporting
- Support multiple channels for your marketing and communications.
- Manage events and their associated sub-events.
- Manage events from a local, regional, or national perspective.
- Benefit from complete annual fundraising campaign support — from identification through segmentation and messaging.
- Use multiple acknowledgement coordination and workflow processes across chapters, fields offices, departments, and programs.
- Get a single system of record that supports all methods of fundraising, including online giving, annual fund, direct mail, event fundraising, major and planned giving, recurring giving, and membership.



Create a 360-degree view of the customer across your organisation.

Human capital

- Easily solicit, track, and manage volunteer time.
- Reduce training needs with an easy-to-use, role-based interface.
- Manage individual and team performance using key performance indicators (KPIs).
- Use customisable courseware and online help tailored to your organisation's unique business processes and workflow.

Programs and mission

- Integrate critical program data with functional information across your organisation.
- Use advanced endowment management features that empower you to communicate investment performance, revenues, and expenses on individual endowments.
- Assure stewardship with a flexible solution that exceeds typical supporter/stewardship needs.
- Integrate data from other mission-critical systems using our open-standards technology.
- Build mission support functionality on the platform and integrate it with the rest of your organisation to complete the 360-degree view of the customer, bringing you even closer to your customers.

Core and operational

- Use organisational reporting and data analyses with key fundraising metrics.
- Support multiple chapters, field offices, departments, and programmes.
- Tailor the application to your organisation's unique business rules and processes.
- Tailor the end-user experience to support your own organisational and individual user needs.
- Get strong reporting, including ad-hoc reporting, that respects security.
- Establish organisational benchmarking, giving you the ability to baseline chapter performance and allow chapter comparisons to find areas of best practices as well as areas that need improvement.

Blackbaud Infinity™

Blackbaud Infinity provides large not-for-profit organisations a state-of-the-art technology platform that enables them to improve their relationships with customers, boost efficiency, and raise more mission-critical funds. Hallmarks of the new platform include flexibility, scalability, and new levels in IT security within a solution that can accept customisations and has a real upgrade path.

Flexibility

- Implement your organisation's business rules to enforce standardised policies and procedures.
- Roll out the solution at your own speed — one office or chapter at a time, or across the entire organisation at once.

Scalability

- Take advantage of an enterprise platform designed for speed and scale.

Security

- Assign rights and privileges for sharing or restricting information between departmental and functional areas.
- Get role-based access control for individual functions.

International support

- Get foreign language and multi-currency support.

Smart client web delivery

- Get a 100% web-deployed application.
- Expand your reach to your entire organisation (multiple branches and field offices, remote advancement officers working from home, etc.).
- Decrease demands for IT support (there is no need to install or update machines the traditional way).

Integration

- Use an open-standards technology platform.
- Benefit from the web services model.

Comprehensive auditing

- Get accountability and historical perspective for troubleshooting and system roll-back.

Future-proofed technology investment

- Standards-based technology provides the ability to upgrade as the technology changes.

The Blackbaud Difference

- No one understands the complex relationships between large not-for-profit organisations and their customers like Blackbaud.
- Our solution provides a true enterprise advancement system that incorporates best practices in fundraising and can be further tailored to meet the specific business processes and procedures of your organisation.
- It can help your organisation manage customer relationships efficiently while maximising the value and impact of those relationships.
- By partnering with Blackbaud, your organisation will enter into a long-term relationship with a market leader that has more than 30 years of experience in the not-for-profit space and can help maximise the value of your customers.