

<bbcon 2016>

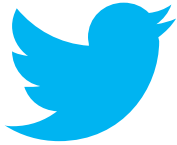
WHERE TECHNOLOGY AND SOCIAL GOOD MEET

Raiser's Edge NXT: Moving to and Mastering the Next Generation of RE

► Bill Connors, CFRE, bCRE-Pro



Social Goodness



@BillConnorsCFRE



[linkedin.com/in/BillConnorsCFRE](https://www.linkedin.com/in/BillConnorsCFRE)

➤ Make sure to use the hashtag #bbcon!

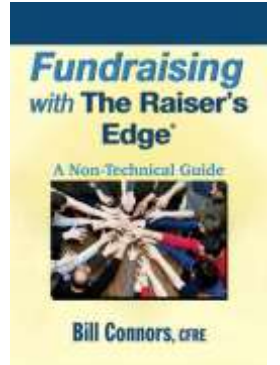
Agenda

1. Brief summary of what “RE NXT” is
 - Resources will be included so you can see more of it later, this is not a demo of the software
2. Why I think we should be so excited about it and interested in it
3. The process of how to move to it to reassure you
 - What you will need to do
 - What you do not need to do or worry about

*Shortened version of roadshow and other presentations

Why I'm Presenting

1. Independent Raiser's Edge consultant and author who was an angry critic turned enthusiastic fan
2. Working with Blackbaud Product Development and Marketing since February 2014
 - I don't take any credit for it
3. Have helped over 20 clients evaluate it
 - Implemented as an interim DBA
4. Have a number of clients actively using it



What RE NXT Is



What Raiser's Edge NXT Is

- It includes the next generation of The Raiser's Edge
 - Simple, beautiful, modern interface
 - Easier
 - More powerful and functional
 - *It's not just a new "overlay"*
- *But it's also much more than "just" RE, it's a package of RE and Blackbaud software and services*
- It's cloud-based, SaaS (software-as-a-service)
 - Access, backups, upgrades, secure, no IT time or server
- Any time, anywhere, any device
- Unlimited users

What Raiser's Edge NXT Is

- It's role-based (fundraiser, executive, administrator...)
- It's prescriptive (lost, overdue, no contact, birthday...)
- It's a more integrated Blackbaud experience
 - Website login, customer support, access to other Blackbaud products, training, community
- It's a new paradigm of software release
 - RE NXT is released and being used (since June 2015, 2,000+),
 - While it's still being built (weekly to biweekly updates),
 - And while we continue to use RE 7, the “database view”
- There's no conversion, now or later
- Open, web-based, REST API
- New contract model with Blackbaud

The Web View

The screenshot displays the Blackbaud Raiser's Edge NXT web interface. At the top, the header includes the logo, database name (Blackbaud (Demo Database 1)), a search bar, and a user greeting (Welcome, Bill Connors). Below the header is a navigation bar with tabs for Fundraising, Lists, and Control Panel. The main content area is titled "Work Center for Bill Connors" and includes a "Change fundraiser" link. A sub-navigation bar shows various metrics: Overview, Portfolio (36), Gifts (27), Actions (3), Opportunities (8), and Unassigned (112). The "Needs attention" section features a "Key Situations" icon and four constituent cards for Anthony Smith, Teresa Berry, Kathryn Elson, and Dennis Hasty. Each card displays contact information, status (e.g., "Overdue pledge", "No contact"), and a recommendation to show gratitude. Below this is a "Portfolio" section with three metrics: 36 Assigned, 1 At risk, and 0 Newly assigned. To the right is a "Gifts" section with metrics: 1 Past due pledges, 41 Total gifts in current fiscal year, and 0 Total gifts in last seven days. The "Opportunities" section shows a funnel with three stages: 1 - Identification (0), 2 - Cultivation (4), and 3 - Solicitation (1). The "Actions" section has metrics: 1 Past due, 0 Upcoming, and 0 Completed. Finally, the "Goals" section is at the bottom right.

Raiser's Edge NXT Blackbaud (Demo Database 1) Search for a constituent Welcome, Bill Connors

Fundraising Lists Control Panel Open database view

Work Center for Bill Connors Change fundraiser

Overview Portfolio 36 Gifts 27 Actions 3 Opportunities 8 Unassigned 112

Needs attention

Key Situations
To highlight key situations (good or bad) to help cultivate the relationship and prioritize interactions.

Anthony Smith
3675 Small Street
New York, NY 10018
% Overdue pledge % No contact
See more
Recommendation
Gently remind the donor of the pledge and determine whether they'll fulfill their commitment.

Teresa Berry
749 Oakway Lane
Glendale, CA 91204
% Recent gift % No contact See more
Recommendation
To show your gratitude, thank the donor appropriately through their preferred channel.

Kathryn Elson
3578 Courtright Street
Larkton, MD 21050
% Recent gift % No contact See more
Recommendation
To show your gratitude, thank the donor appropriately through their preferred channel.

Dennis Hasty
4888 Free Street
Bluefield, WV 24701
% Recent gift % No contact See more
Recommendation
To show your gratitude, thank the donor appropriately through their preferred channel.

View all constituents with tags

View all constituents with tags

Portfolio
Updated 6 minutes ago
36 Assigned 1 At risk 0 Newly assigned

Gifts
Updated 6 minutes ago
1 Past due pledges 41 Total gifts in current fiscal year 0 Total gifts in last seven days

Opportunities
\$7.3m Ask \$3m Funded \$6.5m Expected
1 - Identification (0) 2 - Cultivation (4) 3 - Solicitation (1)

Actions
1 Past due 0 Upcoming 0 Completed

Goals
Updated 6 minutes ago

The Web View

Raiser's Edge NXT - Blackbaud (Demo Database 1) - Search for a constituent

Welcome, Bill Connors

Fundraising Lists Control Panel Open database view

Work Center for Bill Connors [Change fundraiser](#)

Overview **Portfolio 36** Gifts 20 Actions 3 Opportunities 8 Unassigned 12

36 Constituents [List updated 7 minutes ago](#)

Find on this list

	Constituent summary	Assigned to	Constituent codes	Lifetime giving	First gift	Latest gift	Greatest gift	Last action
MA	Mark Adamson 125 Smoketree Way Charleston, SC 29407 madamson@scnc.net (843) 798-6608	Bill Connors (Campaign)	Board Member Major Donor	\$765.1k	\$100 donation 1/4/2014 Annual Fund	\$75 donation 12/31/2015 Sustaining Support for IAC	\$450,000 donation 4/4/2014 Annual Fund	Phone call - M 2/17/2016 Jan ✓2/17/2016 Campaign Update See more
AC	Archdiocese of Chicago 835 N Rush St Chicago, IL 60611-2030	Bill Connors (Campaign)	Friend	\$12m	\$150 donation 2/28/2014 Faculty Sustaining Support	\$35 donation 7/1/2016 New and Renovated Science Facilities	\$400,009 donation 5/22/2014 Annual Fund	None
TB	Teresa Berry 749 Oakway Lane Gardale, CA 91204	Bill Connors (Campaign)	Alumni Major Donor	\$500.6k	\$500,000 donation 4/11/2014 Carnegie Hall Renovation	\$100 donation 10/19/2016 General Endowment	\$500,000 donation 4/11/2014 Carnegie Hall Renovation	None
JB	Jacqueline Boettcher 899 College Avenue Hammonton, OH 45180	Bill Connors (Campaign)	Alumni Major Donor	\$1.5m	\$25 donation 8/18/2014 Annual Fund	\$25 donation 12/31/2015 Annual Fund	\$1,500,000 donation 8/8/2015 Fieldhouse Renovation	None
RB	Rose Bova 1883 Oakmead Drive Lombard, IL 60148	Bill Connors (Campaign)	Alumni Major Donor	\$1m	\$25 donation 9/5/2014 Annual Fund	\$1,000,000 donation 1/28/2016 Cline Hall Addition	\$1,000,000 donation 1/28/2016 Cline Hall Addition	None
LC	Larry Campbell 312 Tedrick Road Tampa, FL 33624	Bill Connors (Campaign)	Alumni Major Donor	\$1m	\$25 donation 2/27/2015 Annual Fund	\$1,000,000 donation 10/2/2015 New and Renovated Science Facilities	\$1,000,000 donation 10/2/2015 New and Renovated Science Facilities	Email - Corresp 3/2/2016 Jan ✓3/2/2016 Campaign Update See more

FILTER Hide

Donor characteristics

- Constituent codes
- Prospect status
 - ☐ Include inactive
 - ☐ Include deceased

Giving

Total giving

Greater than or equal to

Within this period

At any time

Given or in response to

- Campaigns given to
- Funds given to
- Appeals responded to

Of these types

- Gift types

Assigned to

Tagged with

Wealth characteristics

Ratings

Custom fields

Apply filters Clear

The Web View

The screenshot displays the Raiser's Edge web interface for a constituent profile. The top navigation bar includes 'Fundraising', 'Lists', and 'Control Panel'. A search bar and a welcome message 'Welcome, Bill Connors' are also present. An alert box in the top right corner states: 'Alert: Dr. Hernandez will not be giving us a gift this year in 2016.' The main profile section for 'Mr. Robert Hernandez' includes a photo, a note that he has recently moved to Chicago, and a list of roles: Board Member (1/1/2005 - Present), Major Donor, Volunteer (3/2001 - Present), and 3 more. His membership is listed as 'Individual' since 4/11/2016. Below the profile, there are tabs for 'Alert', 'Edit', and 'Mark as...'. The 'Constituent summary' section on the left provides contact information: Home address (425 S Wabash Ave, Chicago, IL 60605-1208), Business address (4401 Belle Oaks Dr Ste 100, Charleston, SC 29405-8526), and 2 more addresses. It also lists phone numbers (Home: (817) 624-1234, Home: (312) 997-3301, Preferred: (817) 624-1234, and 2 more) and online presence (@OrBobH, a website link, and a personal ID). The 'Giving' section on the right shows a summary of giving: 9 years giving with 8 years consecutive, \$1.5m gifts received, \$0 committed but not paid, and \$0 soft credits, totaling \$1.5m lifetime giving. It also lists specific giving events: first \$10,000.00 pledge (10/11/2007, Computer Lab Fund), latest \$700.00 donation (9/14/2016, Annual Fund), greatest \$1,250,000.00 payment to \$2,500,000.00 planned gift (8/24/2015, New and Renovated Science Facilities), and matching \$370 received on \$4,400. At the bottom, a timeline shows giving and other activities, and a table lists 152 transactions received, with 213 records shown.

Raiser's Edge Nx1™ Blackbaud (Demo Database 1) Search for a constituent Welcome, Bill Connors

Fundraising Lists Control Panel

Prospect status: 1 - Identification - Past due at 88 days

Mr. Robert Hernandez
aka: Bob Spouse: Jane Smith Fundraisers: Rachel Brean, Sam Yu
Robert has recently moved to Chicago.

Constituent code
Board Member
1/1/2005 - Present
Major Donor
Volunteer
3/2001 - Present
and 3 more
Membership
Individual
Lifetime since 4/11/2016

Alert Edit Mark as...

Constituent summary

Update contact information Include inactive

Addresses

Home
425 S Wabash Ave
Chicago, IL 60605-1208
Business
4401 Belle Oaks Dr Ste 100
Charleston, SC 29405-8526
and 2 more

Phone numbers

Home
(817) 624-1234
Home
(312) 997-3301
Preferred
(817) 624-1234
and 2 more

Email addresses

Email
dryang@net.com
Email
RobertGHernandez@gmail.com

Online presence

@OrBobH
https://secure8.com/one/t/master9/admin/Cons...
consID=1100536&tabID=personal

Giving

Updated 8 minutes ago
9 years giving with 8 years consecutive
\$1.5m gifts received + \$0 committed but not paid + \$0 soft credits = \$1.5m lifetime giving

first \$10,000.00 pledge 10/11/2007 Computer Lab Fund
latest \$700.00 donation 9/14/2016 Annual Fund
greatest \$1,250,000.00 payment to \$2,500,000.00 planned gift 8/24/2015 New and Renovated Science Facilities
matching \$370 received on \$4,400

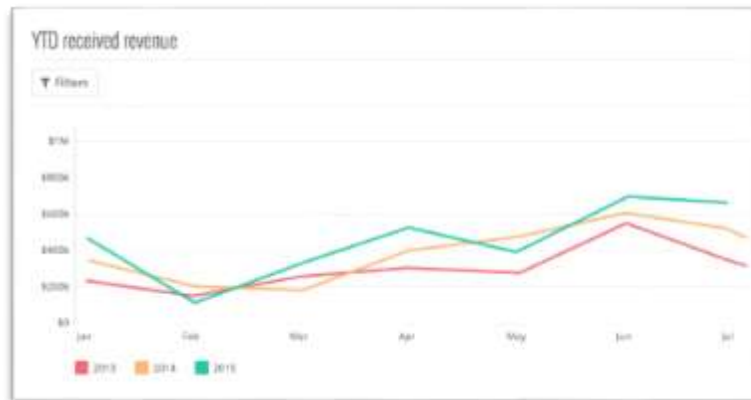
152 Transactions received 213 Records

Date	Amount	Type	Fund
9/14/2016	\$1,400.00	Matching gift pledge	Annual Fund

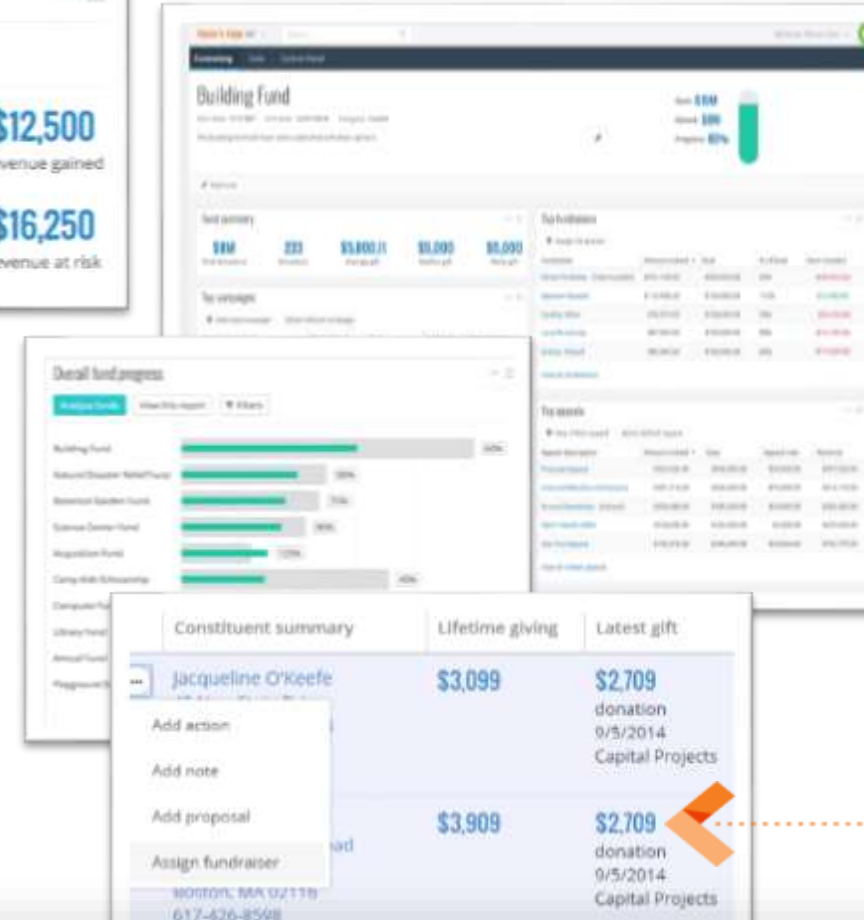
Execute on tactics proven to reach fundraising goals.



Never let a lapsing donor go unnoticed.



Ensure your revenue is always trending upward.



Blackbaud SKY Reporting

built specifically to help nonprofit directors discover opportunities via dashboards, share knowledge with one-click access to pertinent information and act on information with self-service lists and smart segmentation to drive results...

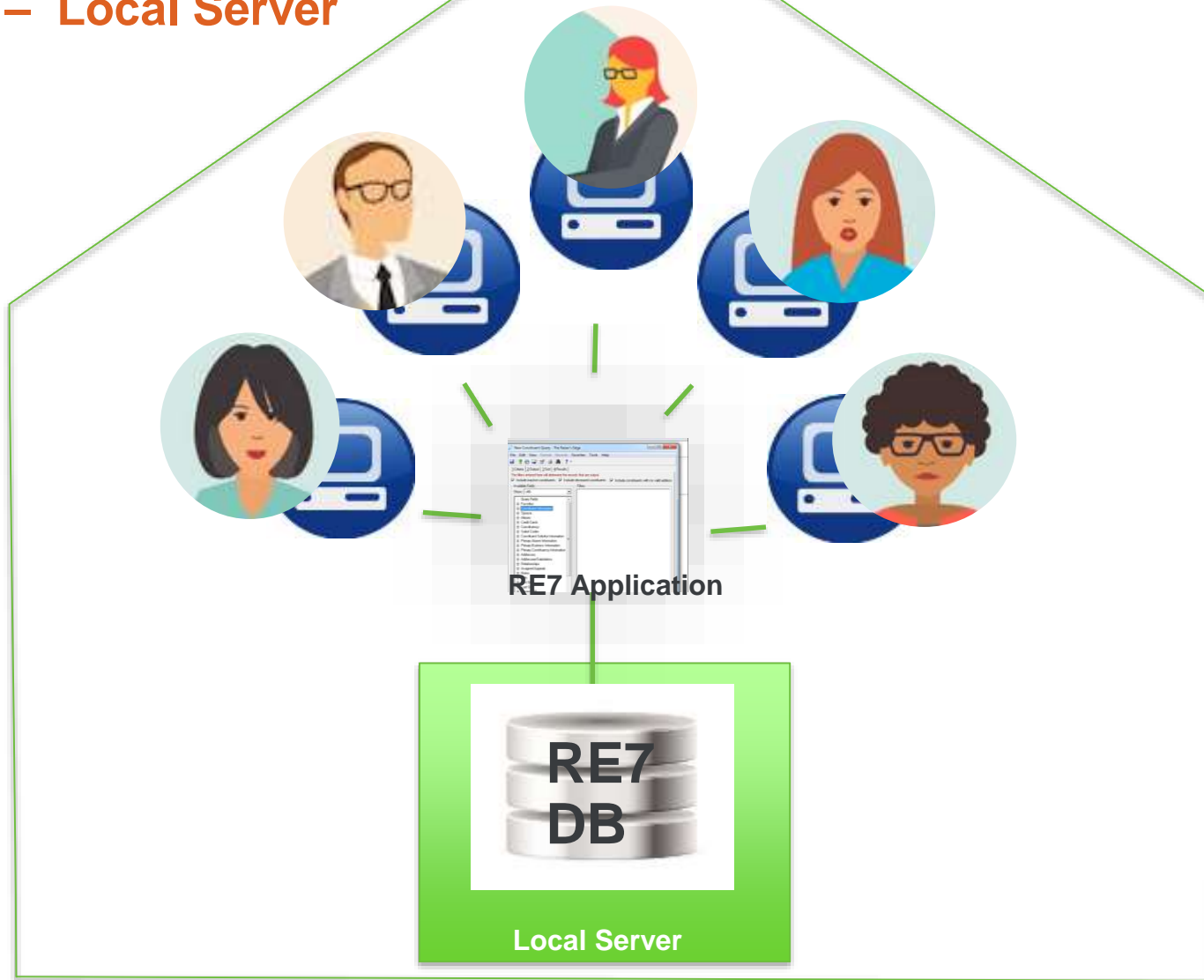
To See More

1. www.theNXTera.com
 - Webinars
2. Two roadshows left this year (Canada)
www.theNXTroadshow2016.splashthat.com
3. Your Blackbaud account executive

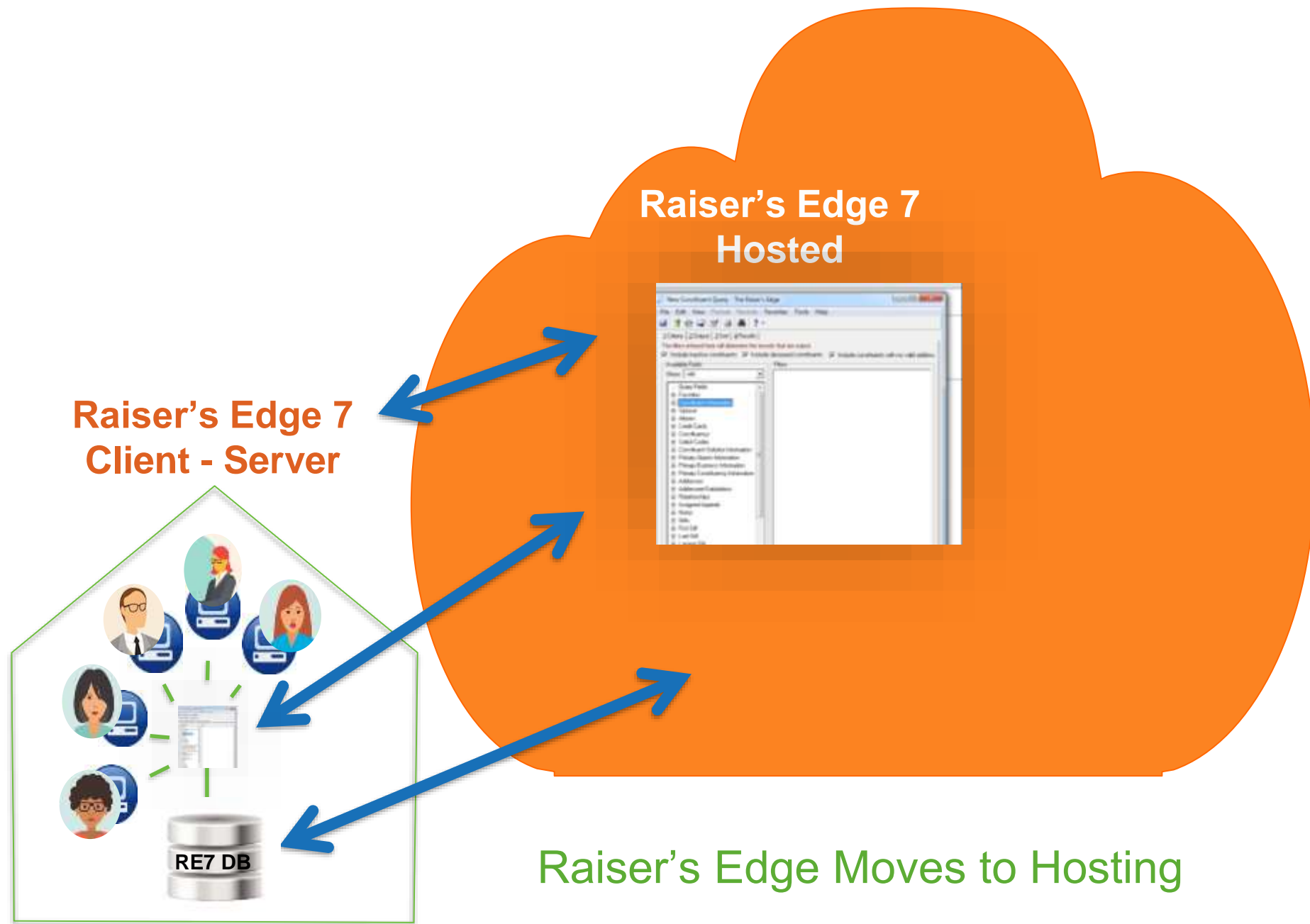
(And do *not* worry about RE 7...Blackbaud will continue to support it for many years to come. RE NXT is an exciting *opportunity*, not a requirement.)



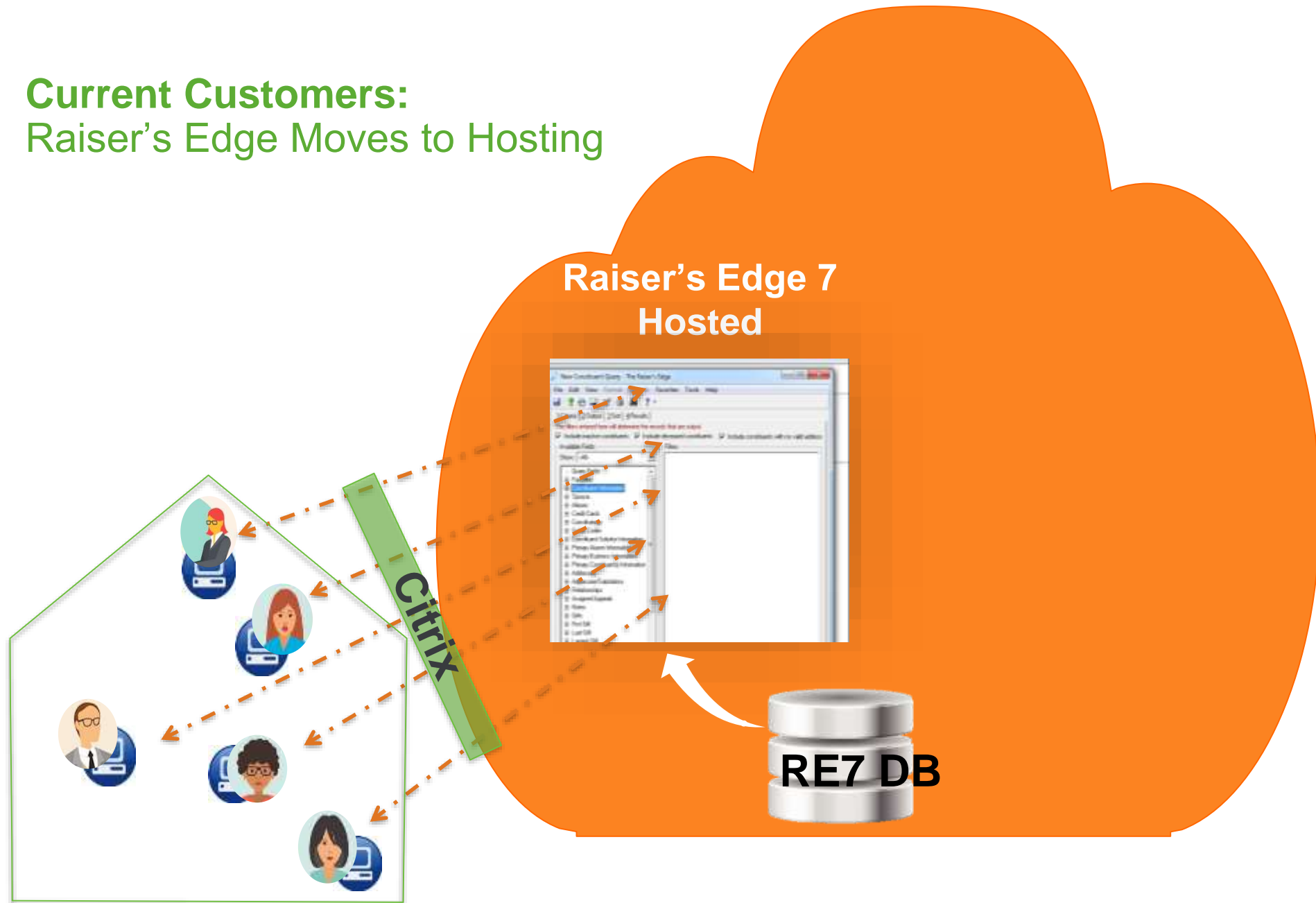
Raiser's Edge 7 Client – Local Server



Raiser's Edge On-Premises Today

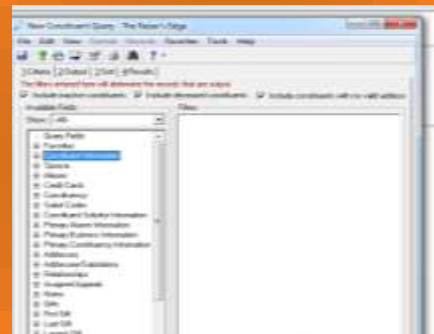


Current Customers: Raiser's Edge Moves to Hosting

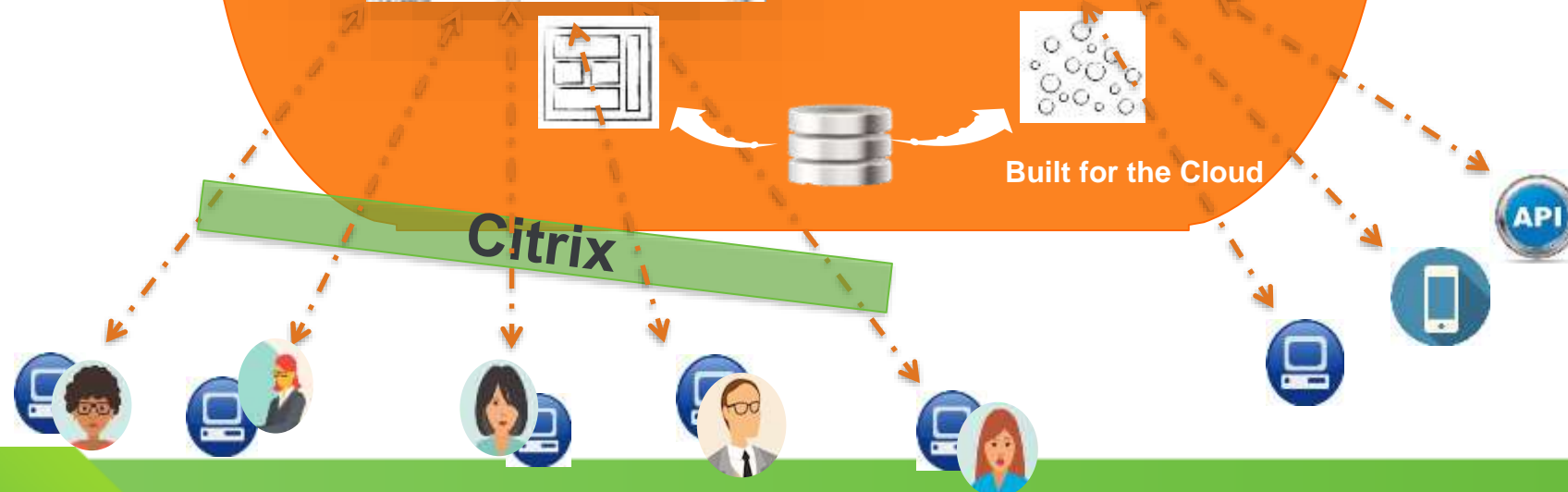


Raiser's Edge NXT

“Database” View
power of
The Raiser's Edge



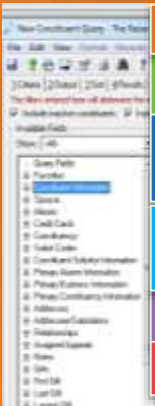
“NXT Web” View
flexible, smart &
built for the future



Raiser's Edge NXT

“Database” View

“NXT Web” View



- Data Entry
- Fundraising
- Executive Reporting
- Events & Marketing
- Membership
- Volunteer

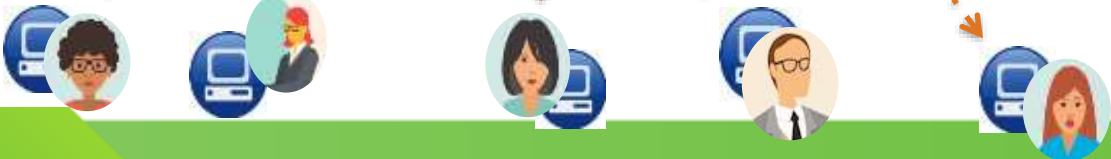
Work Center for James Ballou

Portfolio: 149 Gifts: 189 Actions: 132 Proposals: 252

149 Constituents

Constituents summary Constituents table Designated as Status

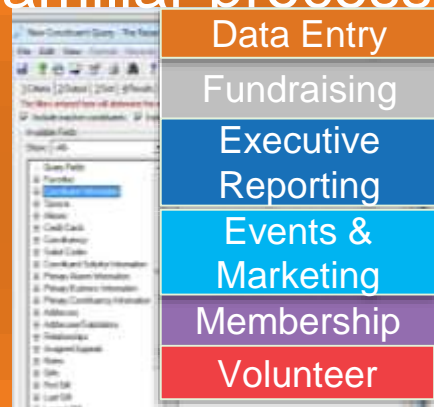
Constituents summary	Constituents table	Designated as	First gift	Latest gift	Summary gift
Alice Adams 1000 Maple View Street Forest Hill, SC 29627 Alice.Adams@BlueMountain.com	Friend 6/10/2017 - Present	James Ballou Chairman	\$100 donation 1/1/2017 Fundraising Renovation	\$525 proposal 1st \$2,500 pledge 1/1/2017 Fundraising Renovation	\$5,000 annual grant 1/1/2017 Capital Program
David Anderson 1000 Maple View Street Forest Hill, SC 29627 David.Anderson@BlueMountain.com	Friend 6/10/2017 - Present	James Ballou Chairman	\$100 donation 1/1/2017 Fundraising Renovation	\$525 proposal 1st \$2,500 pledge 1/1/2017 Fundraising Renovation	\$5,000 annual grant 1/1/2017 Capital Program



Raiser's Edge NXT

“Database” View
Familiar processes

“NXT Web” View
Simple and smart



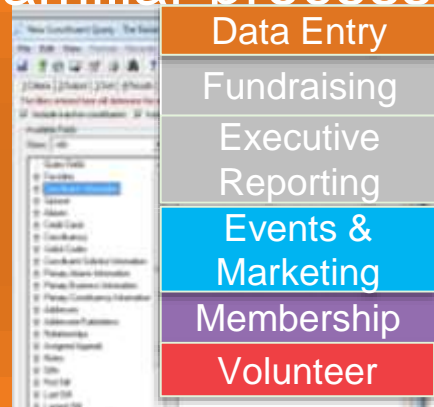
Citrix



Raiser's Edge NXT

“Database” View
Familiar processes

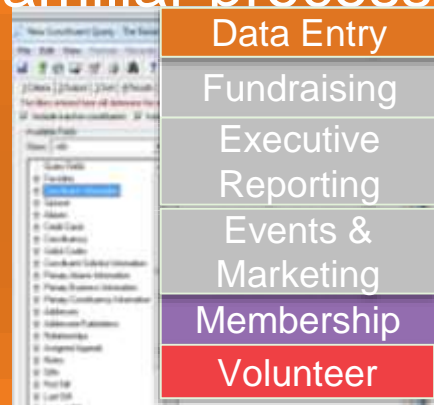
“NXT Web” View
Simple and smart



Raiser's Edge NXT

“Database” View
Familiar processes

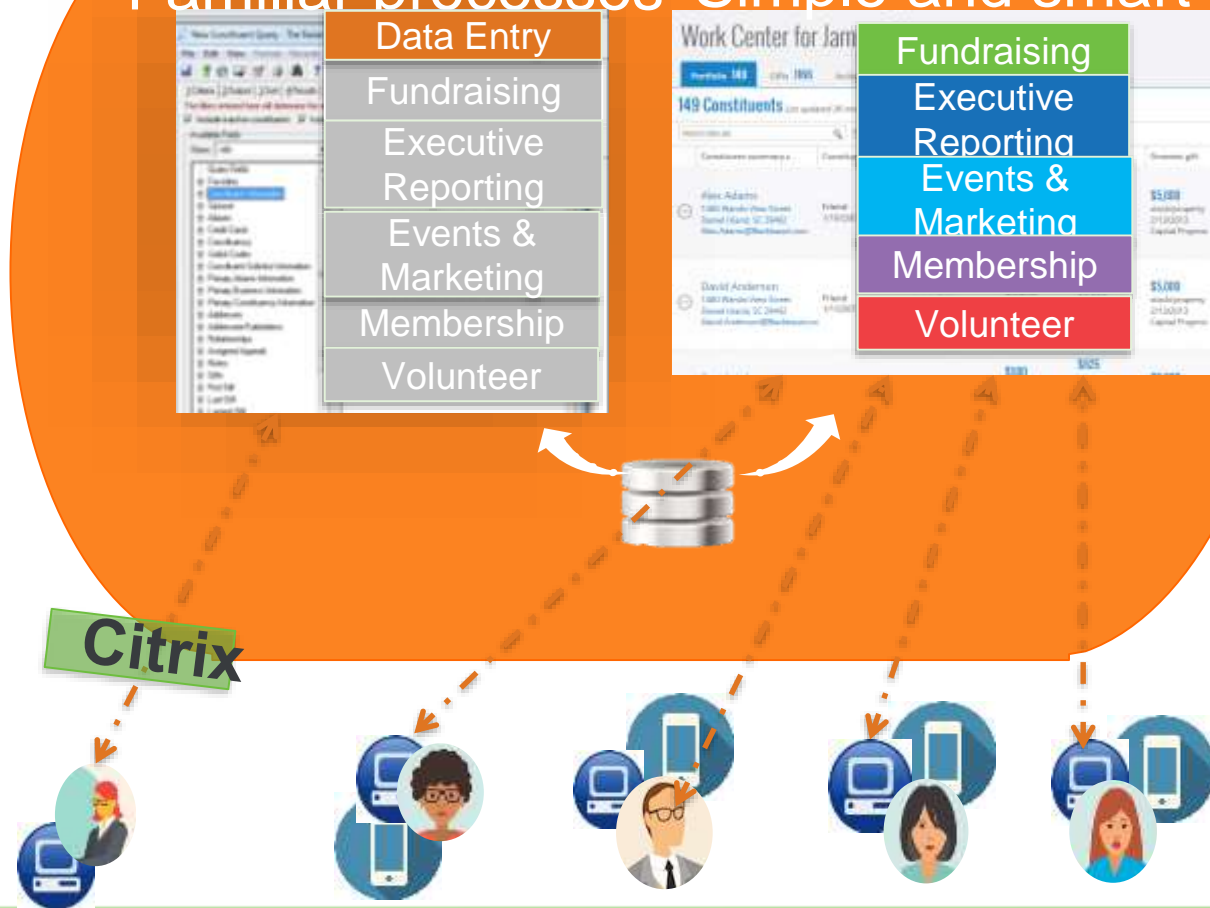
“NXT Web” View
Simple and smart



Raiser's Edge NXT

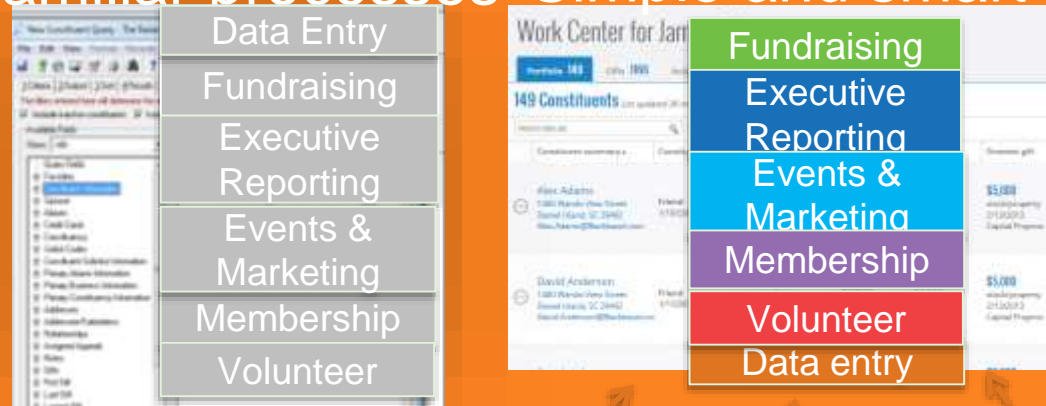
“Database” View
Familiar processes

“NXT Web” View
Simple and smart



Raiser's Edge NXT

“Database” View “NXT Web” View
Familiar processes Simple and smart



Subscription Packages

SUBSCRIPTION PACKAGES	STARTER	ESSENTIALS	PRO
CLOUD ACCESS			
Web and Mobile Access	✓	✓	✓
Unlimited Users	✓	✓	✓
Training Videos and Chat Support	✓	✓	✓
FUNDRAISING & SUPPORTER MANAGEMENT			
Email and Online Fundraising	✓	✓	✓
Crowdfunding	✓	✓	✓
Recurring Gifts (EFT) and Payment Processing	✓	✓	✓
Tribute and Memorial Gifts		✓	✓
Planned Giving			✓
Prospect Research			✓
Events			✓
Membership			✓
Volunteer			✓
Alumni			✓
DATA ENRICHMENT & ANALYTICS			
Address Updates and Wealth Ratings	✓	✓	✓
Email and Phone Appends		✓	✓
Suggested Major Donors & Ask Amounts		✓	✓
ResearchPoint™: Prospect Research Screening			✓

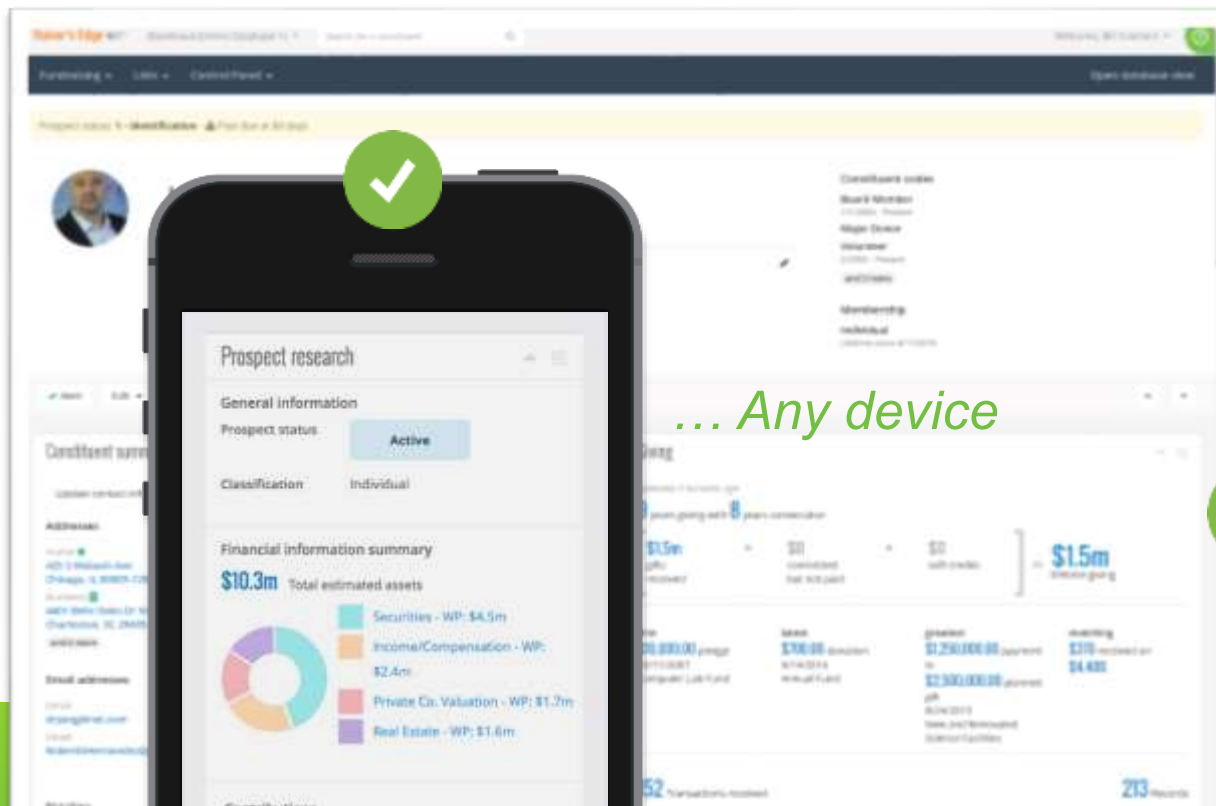
Why RE NXT

What It Means for You and Me



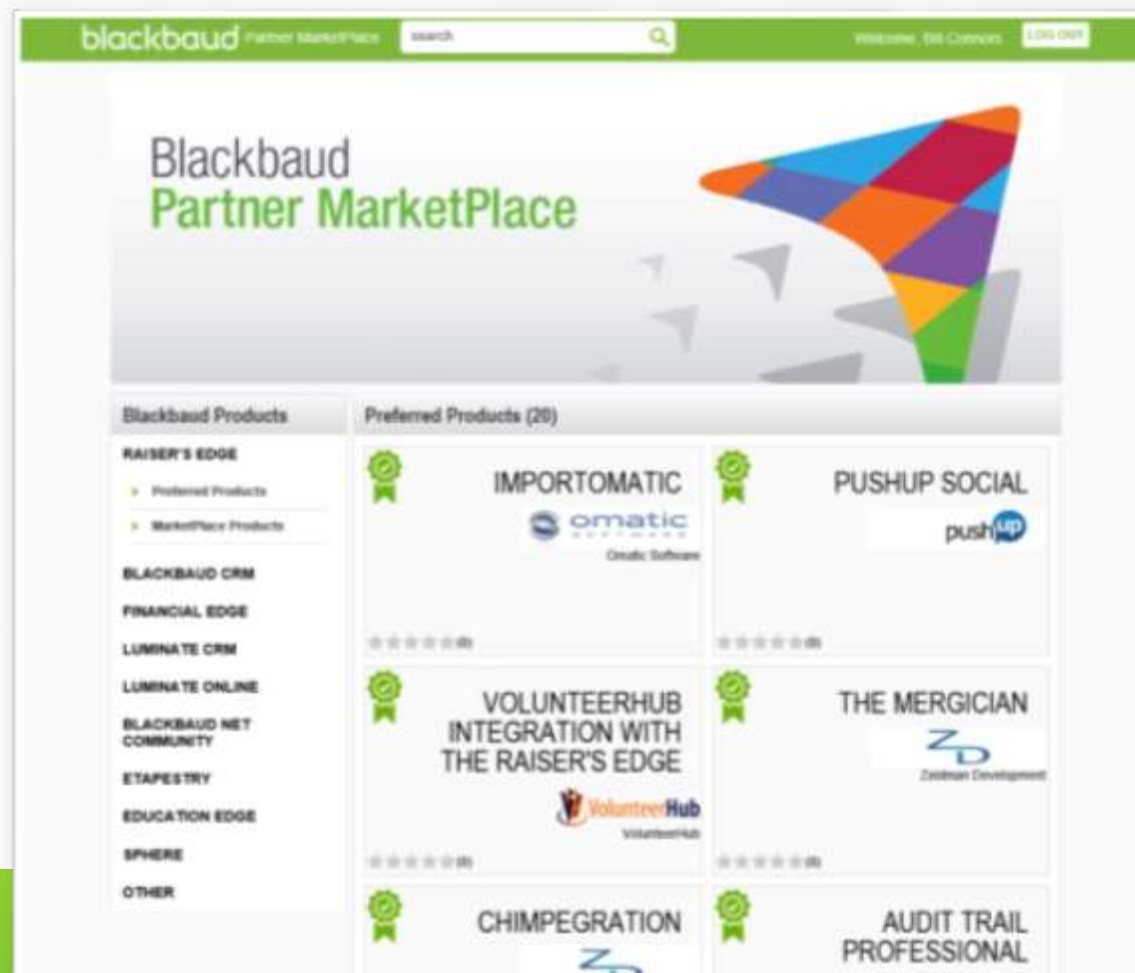
So what does Raiser's Edge NXT mean for you and me?

- 10. *We have something new and exciting!*
- 9. *Anywhere, any time...*
- 8. *State of the art design and technology*



So what does Raiser's Edge NXT mean for you and me?

7. *The Blackbaud API and Partner Marketplace*



So what does Raiser's Edge NXT mean for you and me?

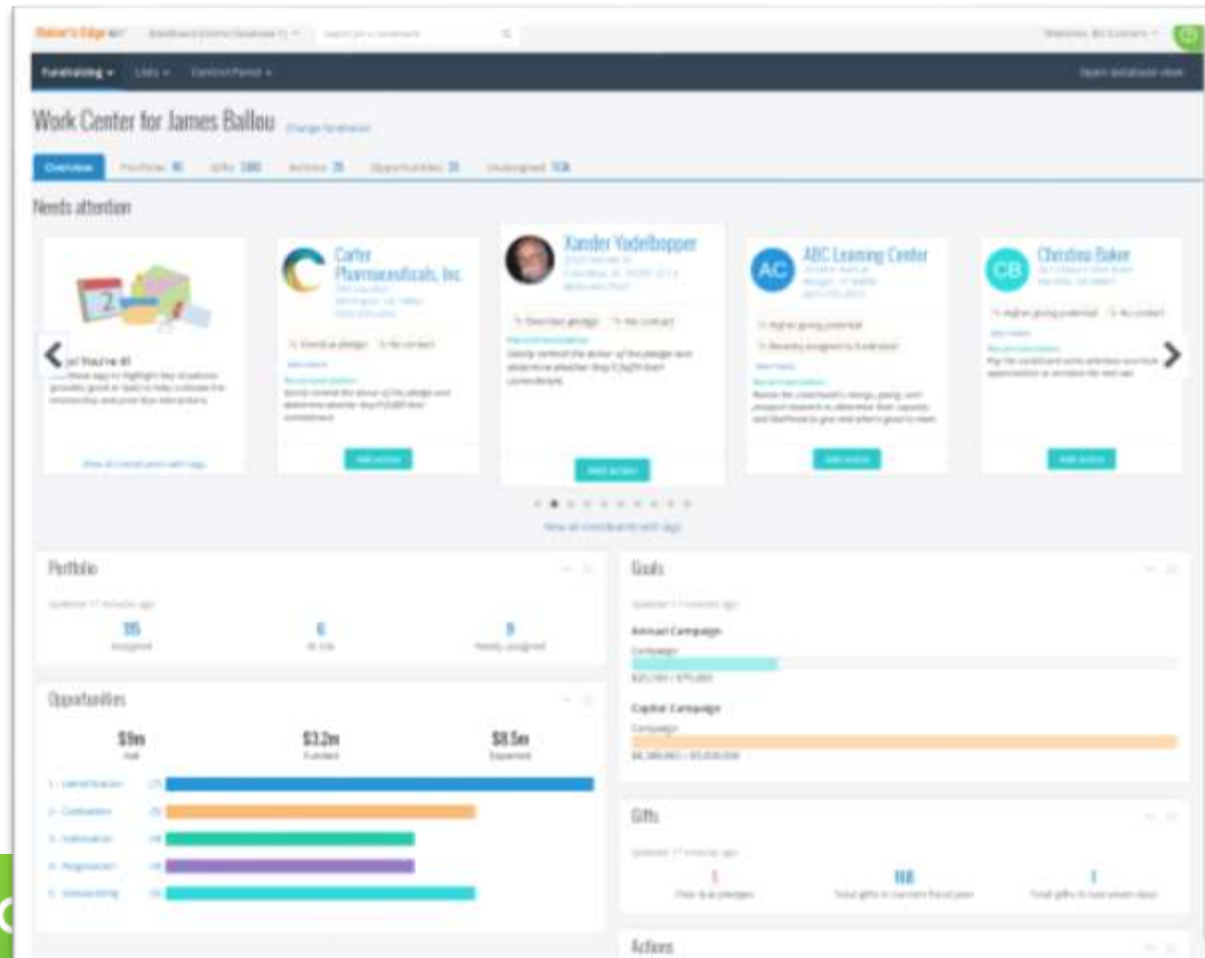
- 6. *Better integration (and lots of it) with the Blackbaud family of products and services*
- 5. *Easier conversion and implementation*
- 4. *Cloud-based convenience and functionality*



- 3. *Unlimited users*
No more paying by the seat...

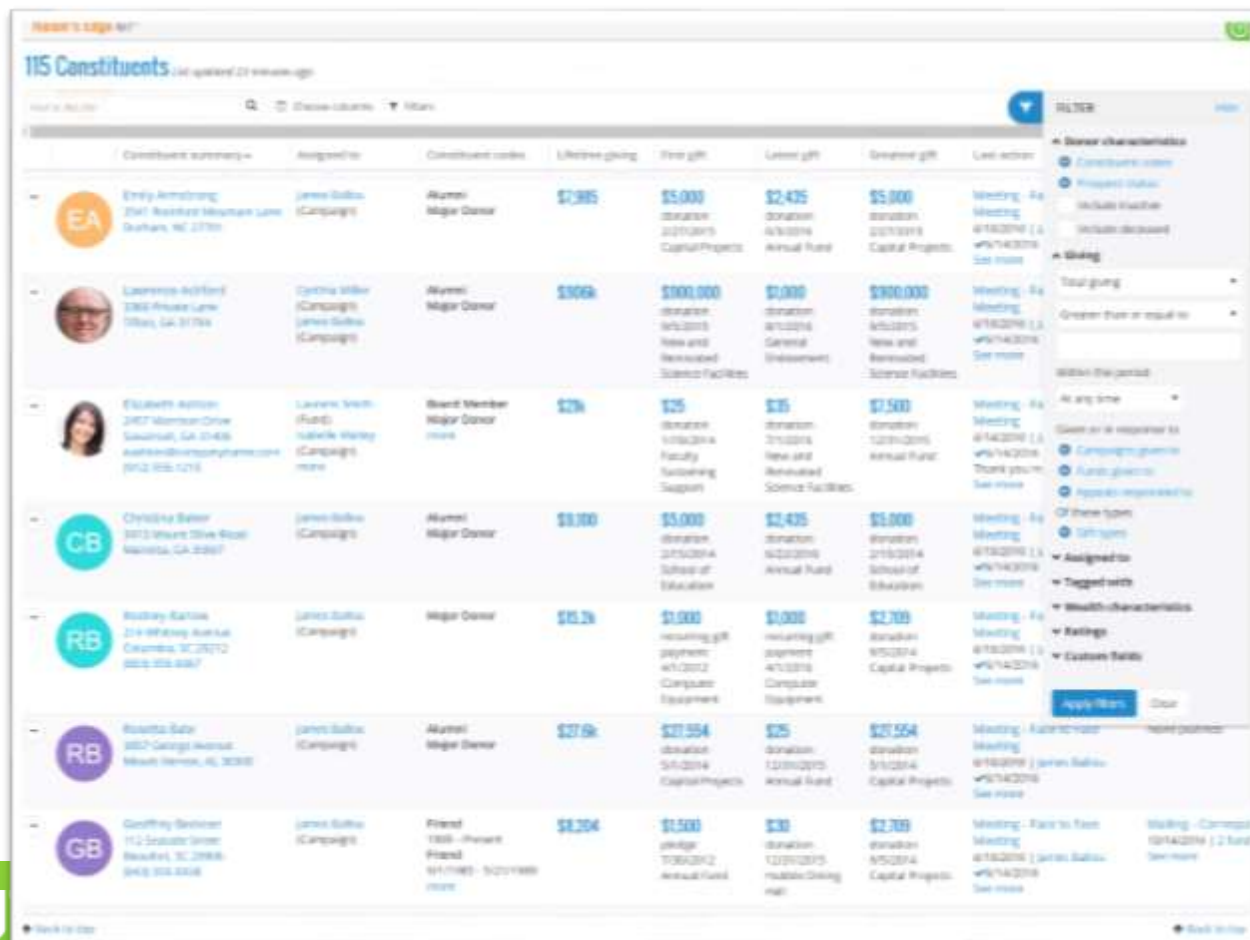
So what does Raiser's Edge NXT mean for you and me?

2. Prescriptive nature



So what does Raiser's Edge NXT mean for you and me?

1. Role focus starting with fundraisers



Constituent summary	Assigned to	Constituent codes	Lifetime giving	First gift	Latest gift	Greatest gift	Last action
EA Emily Armstrong 2641 Rockford Mountain Lane Durham, NC 27705	James Salvo (Campaign)	Alumni Major Donor	\$7,985	\$5,000 donation 2/15/2015 Capital Projects	\$2,435 donation 6/15/2016 Annual Fund	\$5,000 donation 2/15/2015 Capital Projects	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 See more
Lawrence McLeod 3365 House Lane Tomb, GA 31756	Cynthia Miller (Campaign) James Salvo (Campaign)	Alumni Major Donor	\$906	\$900,000 donation 9/15/2015 New and Renovated Science Facilities	\$1,000 donation 9/15/2015 General Development	\$900,000 donation 9/15/2015 New and Renovated Science Facilities	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 See more
Elizabeth Sutton 2467 Womack Drive Savannah, GA 31406 ashton@blackbaud.com (912) 955-1215	Lauren Smith (Fund) Natalie Henry (Campaign) more	Board Member Major Donor more	\$26	\$25 donation 1/15/2016 Faculty Supporting Support	\$35 donation 7/15/2016 New and Renovated Science Facilities	\$7,500 donation 1/15/2016 Annual Fund	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 Thank you See more
CB Christina Baker 3013 Mount Olive Road Macon, GA 31207	James Salvo (Campaign)	Alumni Major Donor	\$3,300	\$5,000 donation 2/15/2014 School of Education	\$2,435 donation 6/15/2016 Annual Fund	\$1,000 donation 2/15/2014 School of Education	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 See more
RB Rodney Ratnes 214 Wilkes Avenue Columbia, SC 29212 (803) 555-8867	James Salvo (Campaign)	Major Donor	\$15.2k	\$1,000 recurring gift payment 4/15/2012 Computer Equipment	\$1,000 recurring gift payment 4/15/2016 Computer Equipment	\$2,709 donation 9/15/2014 Capital Projects	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 See more
RB Rosetta Bate 3027 George Avenue Mableton, GA 30156	James Salvo (Campaign)	Alumni Major Donor	\$27.5k	\$27,554 donation 5/15/2014 Capital Projects	\$25 donation 12/15/2015 Annual Fund	\$27,554 donation 5/15/2014 Capital Projects	Meeting - 6a Meeting 4/16/2016 (1) 4/16/2016 See more
GB Geoffrey Givens 112 Slaters Lane Newark, NJ 07102 (973) 555-8868	James Salvo (Campaign)	Friend 100+ - Present Friend 9/15/1987 - 9/15/1999 more	\$8,204	\$1,500 major 1/15/2012 Annual Fund	\$30 donation 12/15/2015 Public Giving mail	\$2,709 donation 9/15/2014 Capital Projects	Meeting - Face to Face Meeting 4/16/2016 (1) 4/16/2016 See more

How to Move to RE NXT

What to Do, What Not to Worry About



Getting ready for NXT...

► WHAT YOU NEED TO WORK ON

- Consider Blackbaud Hosting
- Spread the word
- Talk with your account executive about the best package for your organization

► WHAT YOU DON'T NEED TO WORRY ABOUT

- Should I delete constituent records?
- What about getting the data ready?
- How much work is the implementation?



Let's talk about Hosting...

*Already on Blackbaud Hosting? You're all set!**

*Do you have integrations
or processes that might have
issues with Hosting?*

THIS DOES APPLY TO

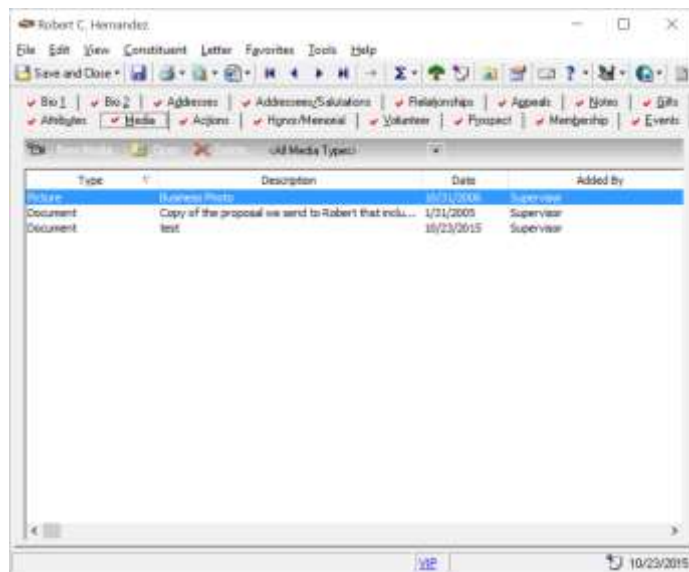
- Financial Edge integrations
- Third-party products
- Any work directly off the backend SQL Server tables

THIS DOES NOT APPLY TO

- Crystal Reports – *fully supported*
- Exporting and importing – *fully supported*
- Printing – *fully supported*
- Blackbaud online integrations – *fully supported*



Media



Robert C. Hernandez

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media

Type	Description	Date	Added By
Picture	Business Photo	10/11/2008	Supervisor
Document	Copy of the proposal we send to Robert that inclu...	1/21/2009	Supervisor
Document	test	10/23/2015	Supervisor

10/23/2015



Attachments

Attach a file

- NXT Ratings in RE 7
10/21/2015 | 53.1 KB
Document
- Proposal for Robert
10/5/2015 | 24 KB
Document



Spread the word



SHARE THE ENTHUSIASM

- Pick the 3 things your team would be most excited about!



Selecting your package

NXT comes with significantly more than Raiser's Edge 7 maintenance

- Hosting
- Unlimited users
- More modules
- Online Express
- Data enrichment services and analytics
- NXT web view

Remember, you're replacing your maintenance, *not adding* to it.



Selecting your package

*Compare that to what
you're paying now:*

- *Blackbaud Hosting, Blackbaud analytics, Blackbaud data enrichment services, Blackbaud online tools*
- *Replaces Wealth Engine, Constant Contact, Network for Good, etc.*
- *No Server or related IT expenses*





Should I delete constituents?

Probably not.

*Let's not replace one bad habit
with another.*

***Instead of deleting
inactive records:***

Run the duplicate report.

*Remember, the count is **possible** duplicates,
not necessarily actual duplicates...*





About deleting records...

Does the number of possible records found justify the potential effort and risk?

A screenshot of a software window titled "Filters". It contains a list of conditions, each preceded by a minus sign in a square box. The conditions are:

- Gift Date blank
- AND Action Date blank
- AND Participant Import ID blank
- AND Assignment Import ID blank
- AND Time Sheet Import ID blank
- AND Prospect Proposal Name blank
- AND Individual Relation Import ID blank
- AND Organization Relation Import ID blank
- AND Constituent Note Import ID blank
- AND Import ID blank

An orange arrow points from the bottom of the window towards the bottom of the slide.



Analysis of a database with 160,000 records



- *49,586 records with no hard credit gift activity*
- *45,099 of those have no actions*
- *44,804 of those have no linked event record*
- *44,500 of those have no volunteer assignment*
- *21,002 of those have no volunteer time sheet*
- *(which means that 23,498 of these folks do have a volunteer time sheet)*
- *20,999 have no proposal*
- *17,559 have no individual relationships*
- *6,735 have no org relationships*
- *5,365 have no soft credit gifts*
- *3,437 have no notes*



See the home page of Bill's website at www.billconnors.com for a whitepaper on this topic

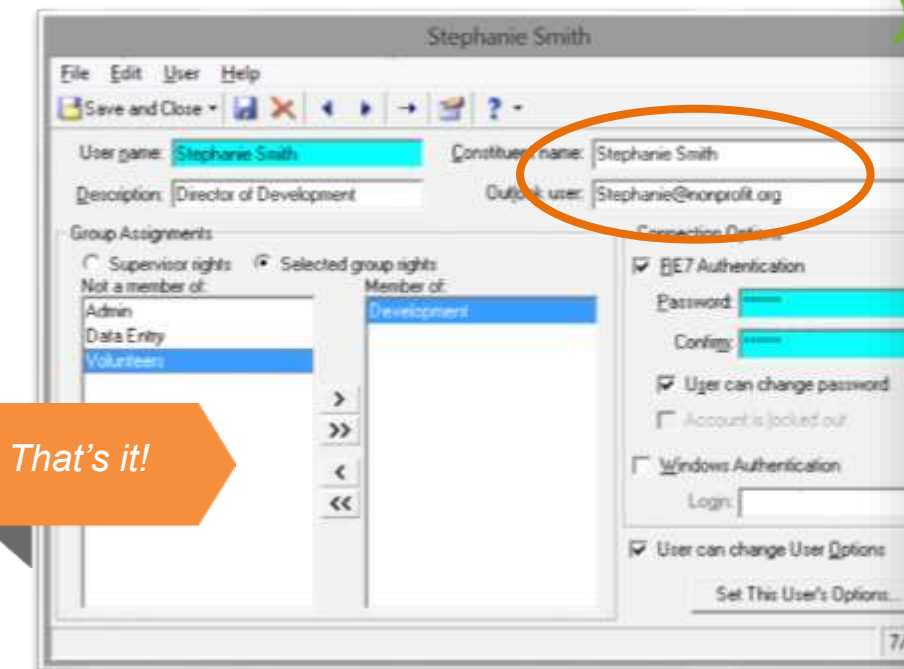


DATA PREPARATION

WHAT DO I HAVE TO DO TO GET MY DATABASE READY?

For Fundraisers (Solicitors) who will want to use the Work Center function of NXT: link constituent records to user accounts in RE 7 Security.

- If you've not yet gone to 7.94/7.95/7.96, grab screenshots of your pivot reports.
- If you're on EE, see KB article 96538.

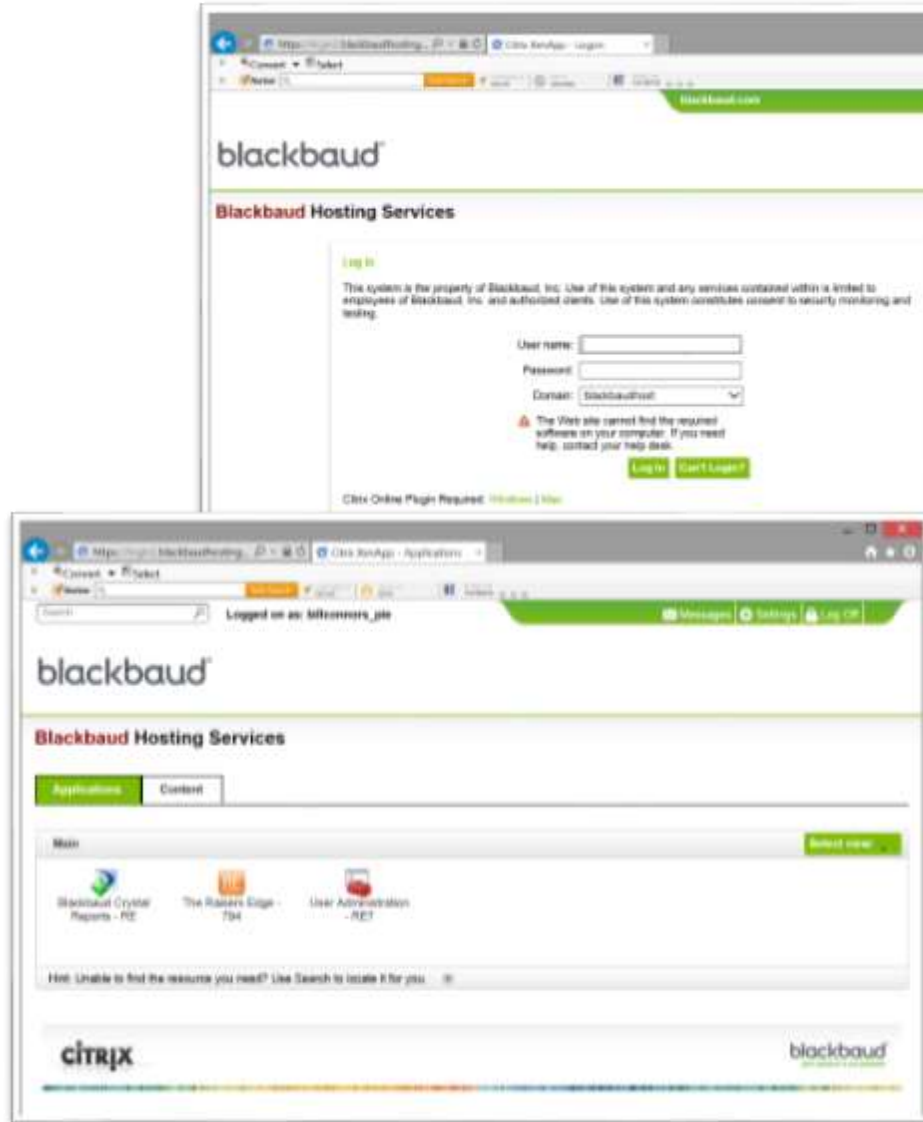




IMPLEMENTATION

MOVE TO HOSTING

1. *Send Blackbaud a backup*
2. *Upgrade to 7.96*
3. *Install Citrix client*
4. *Set up Hosting accounts*
5. *Train users*
6. *Set up Crystal Reports and user options*





IMPLEMENTATION



NXT WEB VIEW SETUP

Action statuses

Prospect statuses

Opportunity statuses

Revenue settings

Set up proposal statuses

To help fundraisers move proposals through your solicitation process, select which status means "Closed" and set how long a proposal can stay in each status before it's considered late.

Status	Means "Closed"	Days until warning
Closed	<input checked="" type="checkbox"/>	<i>Number of days</i>
Cultivation	<input type="checkbox"/>	180
Follow-Up	<input type="checkbox"/>	10
Identification	<input type="checkbox"/>	10
Proposal	<input type="checkbox"/>	20
Rejected	<input checked="" type="checkbox"/>	<i>Number of days</i>
Research	<input type="checkbox"/>	10
Solicitation Visit	<input type="checkbox"/>	5
Stewardship	<input type="checkbox"/>	180
Strategy	<input type="checkbox"/>	5
On hold	<input type="checkbox"/>	20



IMPLEMENTATION

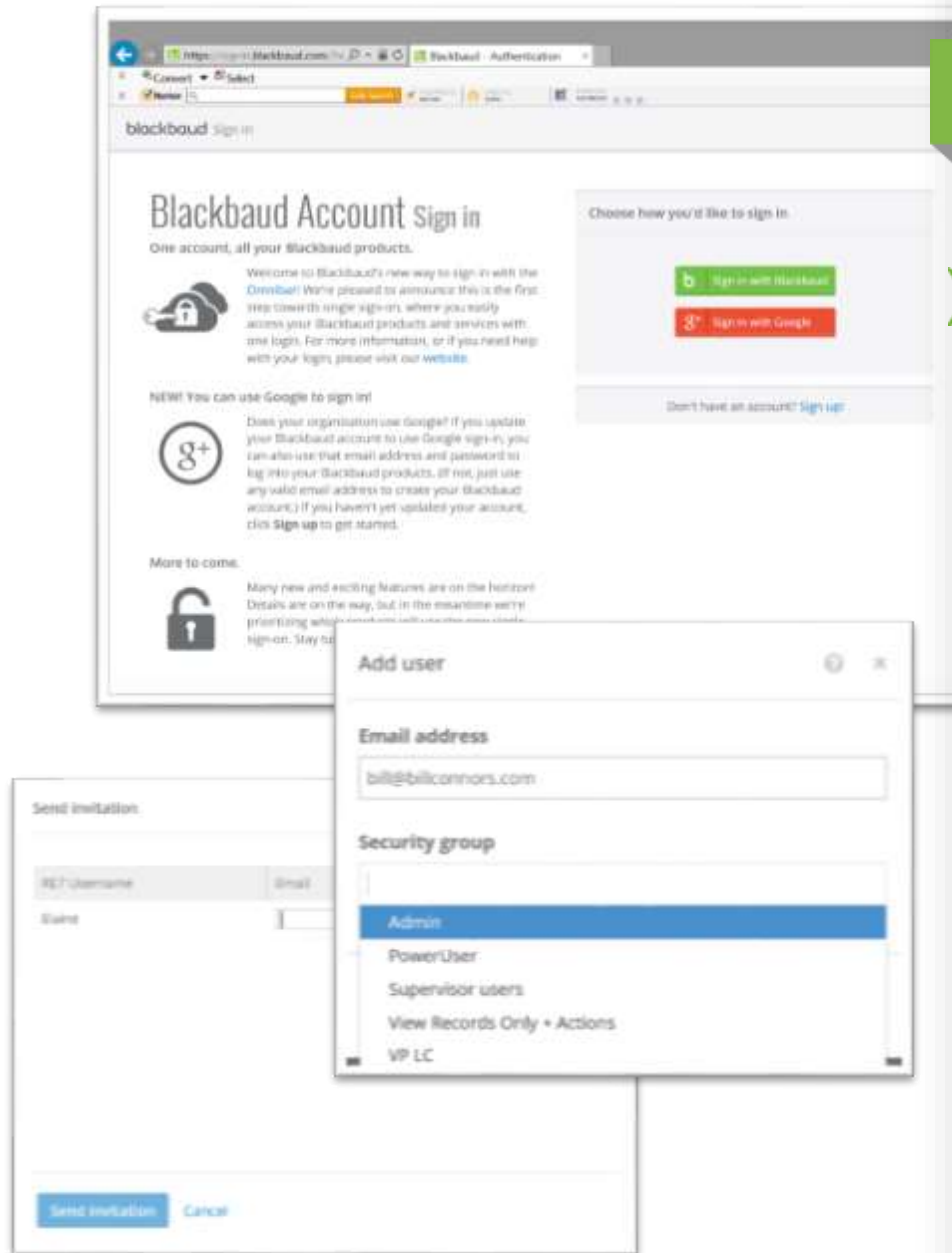


NXT WEB VIEW SETUP

Security groups

HINT:
Save as!

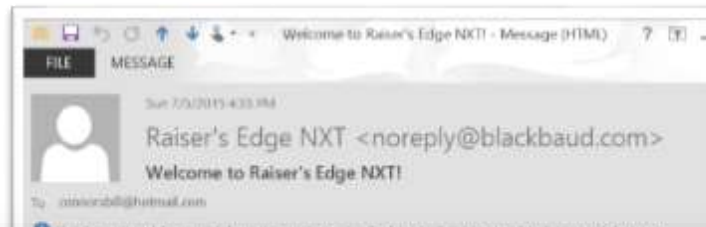
*May require refining your
RE security groups*



IMPLEMENTATION

NXT WEB VIEW SETUP: USERS

- Google accounts or email?
- 10 seconds per user to invite to NXT



IMPLEMENTATION

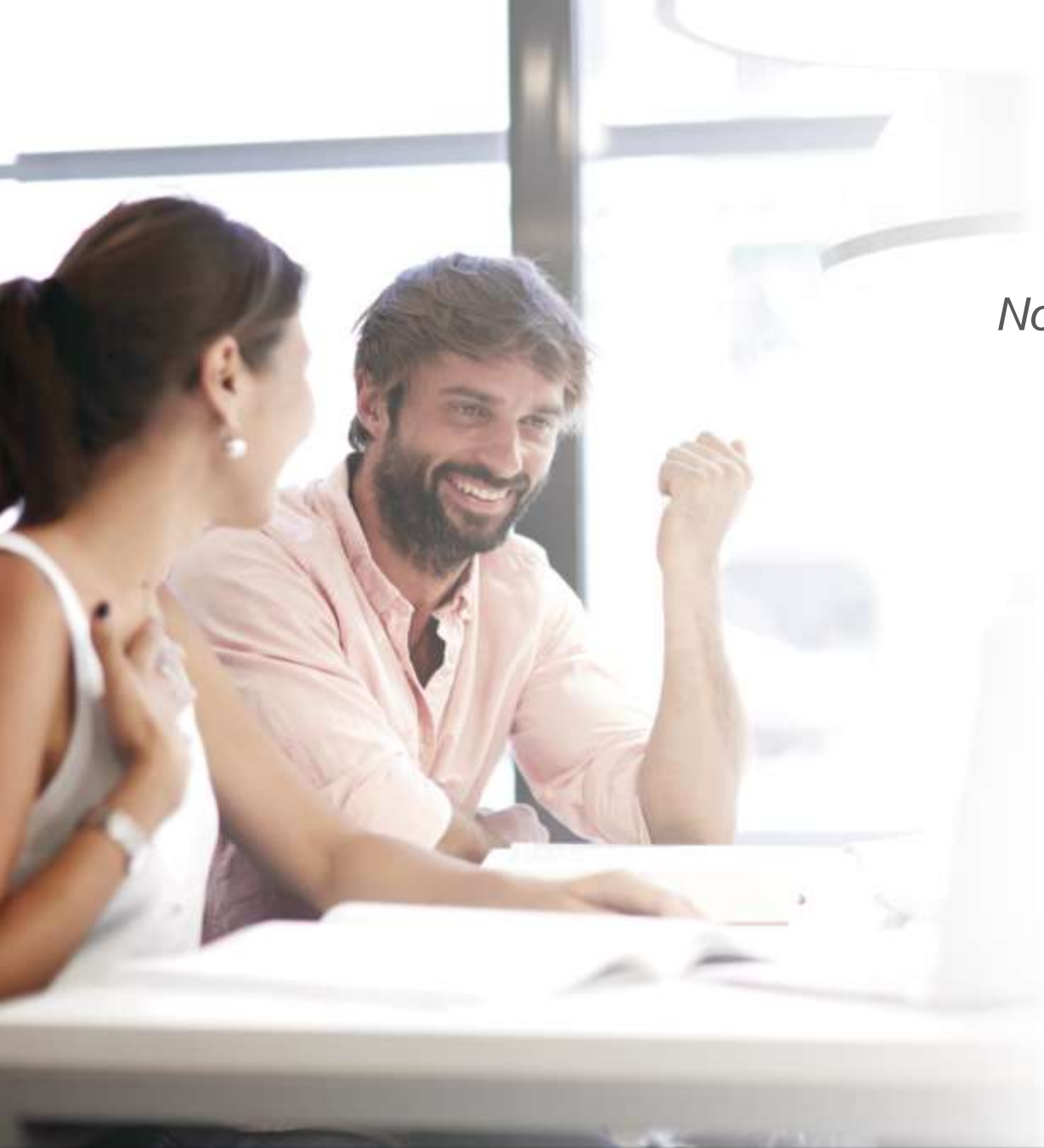


TOPICS

- *Database and NXT web views*
- *Work Center, filtering*
- *Analyze, including Revenue settings*
- *Lists*
- *Portfolios*
- *Tags, including definitions*
- *Searching*
- *Constituents*
- *Tiles*
- *Renamed items*
- *Adding and editing constituents, actions, notes and opportunities*
- *Ratings*
- *Prospect and Opportunity Statuses*
- *Attachments*
- *Reminder of browser capabilities*

NXT WEB VIEW SETUP: USERS

- Tell users invitation email is coming so they know it's legitimate and respond
- Host a 1 to 2-hour walk-through with them



And that's it...

No extensive training and no software to install for NXT Web View users.

Over time you'll be able to:

- *Clean up fundraiser assignments and portfolios*
- *Set fundraiser, campaign, fund and appeal goals*
- *Clean up code tables that NXT web view users will be using most (e.g., Action and Note Types)*
- *Clean up policies and procedures regarding Fundraisers, Actions, Notes and Opportunities*



***But these are
things we should all
be doing anyway...***

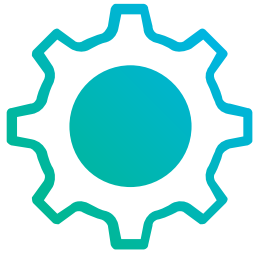
*Being in NXT will help you
get buy-in from your users
to make real progress.*



*Be sure to join
the Blackbaud Support
and RE NXT Communities
to monitor continuing
additions.*



That's it. Easy, right?



Evaluate Hosting



Present new features



Work with your
Blackbaud Account
Executive



City	Venue	Date
Toronto	St. Andrew's Club	Thursday, November 16
Vancouver	Simon Fraser University	Tuesday, December 6

Register here:

www.theNXTroadshow2016.splashthat.com

Q&A and Contact Info

Bill Connors, CFRE, bCRE-Pro

*Independent Consultant and Trainer on
The Raiser's Edge and Raiser's Edge NXT*

415.861.5454

bill@billconnors.com

www.billconnors.com



**Did we leave you
inspired, wired, or fired up?**

Tell us in a session survey on the
mobile app, and you'll be entered to
win a complimentary pass to bbcon
2017 in Baltimore!

