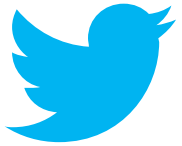
bbcon 2016

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

- Make sure to use the hashtag #bbcon!

Agenda

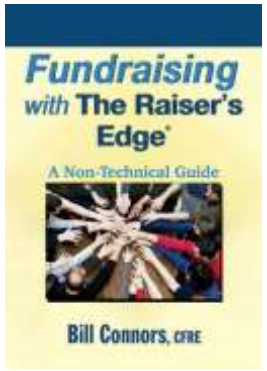
1. Brief summary of what “RE NXT” is
   - Resources will be included so you can see more of it later, this is not a demo of the software

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

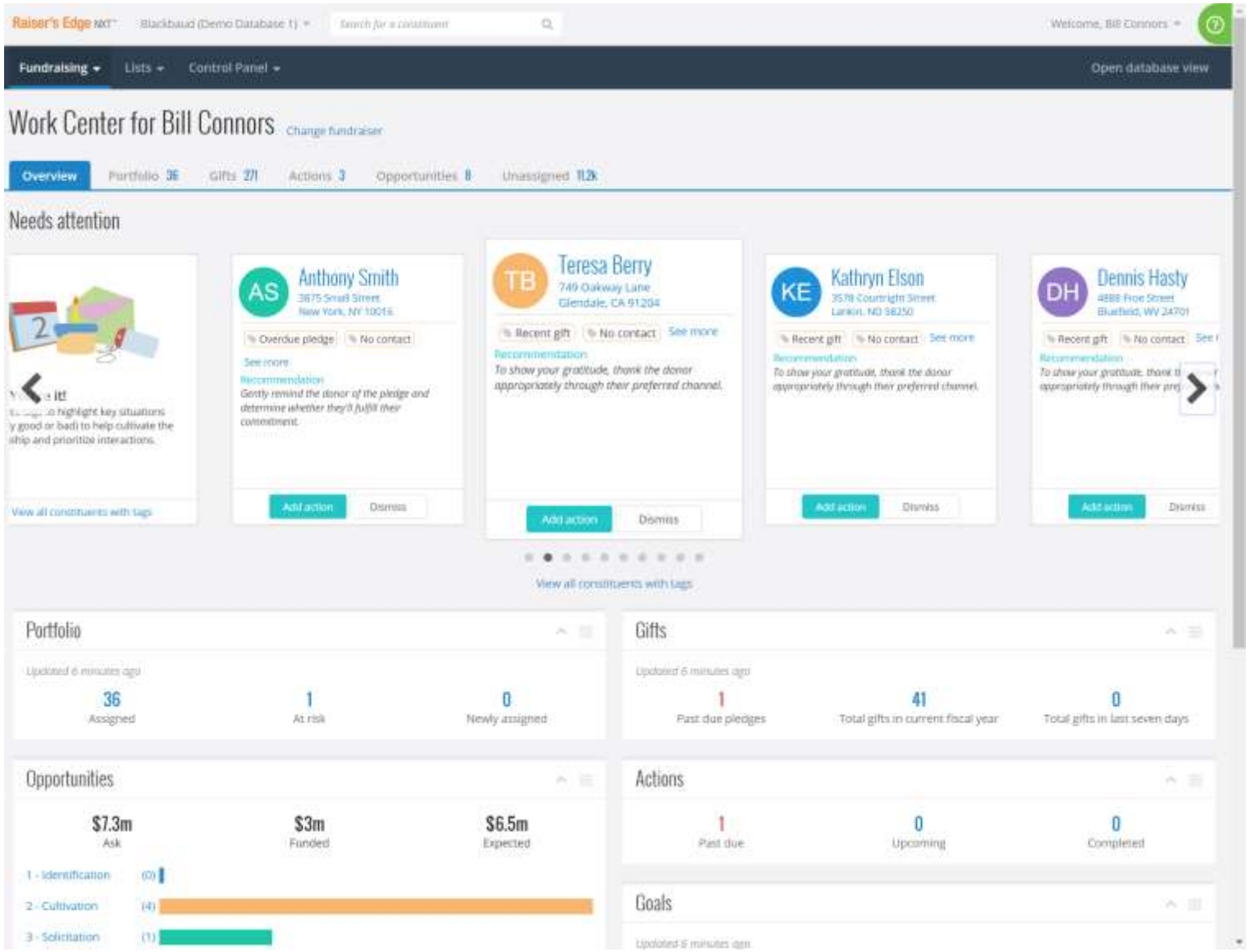
What Raiser's Edge NXT Is

- 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

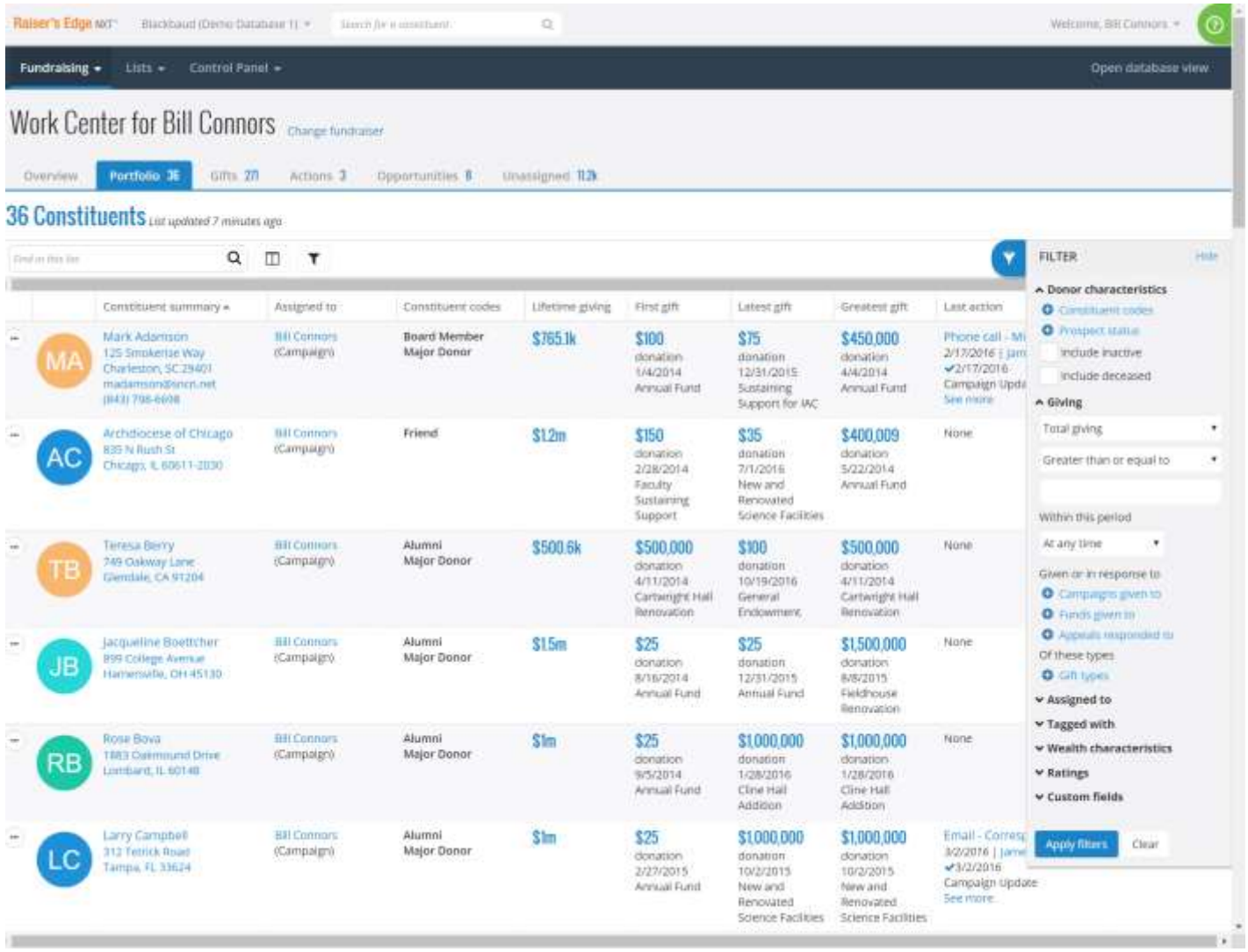
What Raiser's Edge NXT Is

- 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


Raiser's Edge NXT
Blackbaud (Demo Database 1)
Welcome, Bill Connors
Fundraising
Lists
Control Panel
Open database view
Work Center for Bill Connors
Change fundraiser
Overview
Portfolio 36
Gifts 271
Actions 3
Opportunities 8
Unassigned 11.2k
Needs attention
Anthony Smith
3875 Small Street
New York, NY 10016
Overdue pledge
No contact
See more
Recommendation
Gently remind the donor of the pledge and determine whether they'll fulfill their commitment.
Add action
Dismiss
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.
Add action
Dismiss
Kathryn Elson
3578 Courtright Street
Larkin, ND 58250
Recent gift
No contact
See more
Recommendation
To show your gratitude, thank the donor appropriately through their preferred channel.
Add action
Dismiss
Dennis Hasty
4888 Poe Street
Bluefield, WV 24701
Recent gift
No contact
Add action
Dismiss
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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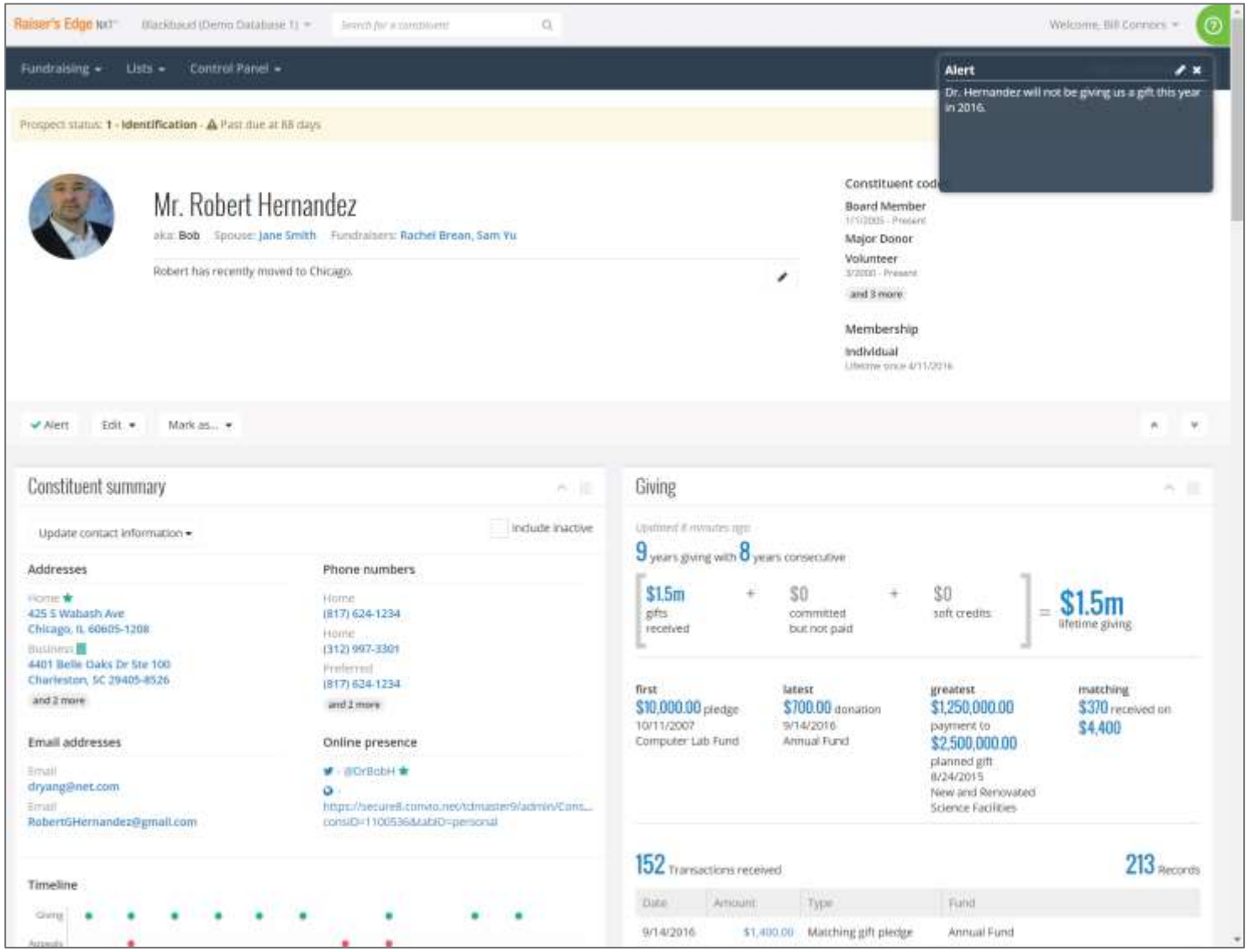
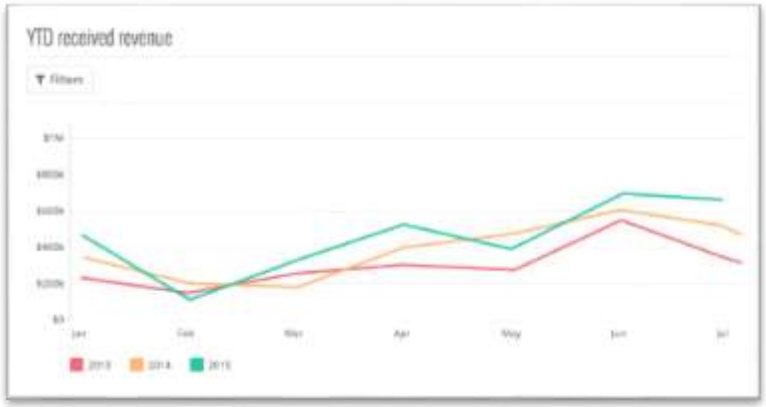
Change fundraiser
Overview
Portfolio 36
Gifts 27
Actions 3
Opportunities 8
Unassigned 11.2k
36 Constituents
List updated 7 minutes ago
Constituent summary
Assigned to
Constituent codes
Lifetime giving
First gift
Latest gift
Greatest gift
Last action
Mark Adamson
125 Smokerise Way
Charleston, SC 29407
madamson@sncn.net
(843) 798-6698
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
Archdiocese of Chicago
835 N Rush St
Chicago, IL 60611-2030
Bill Connors (Campaign)
Friend
$1.2m
$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
Teresa Berry
749 Oakway Lane
Glendale, CA 91204
Bill Connors (Campaign)
Alumni
Major Donor
$500.6k
$500,000 donation 4/11/2014 Cartwright Hall Renovation
$100 donation 10/19/2016 General Endowment
$500,000 donation 4/11/2014 Cartwright Hall Renovation
None
Jacqueline Boettcher
899 College Avenue
Hamersville, OH 45130
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
Rose Bova
1883 Oakmound 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
Larry Campbell
312 Tetrick 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
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

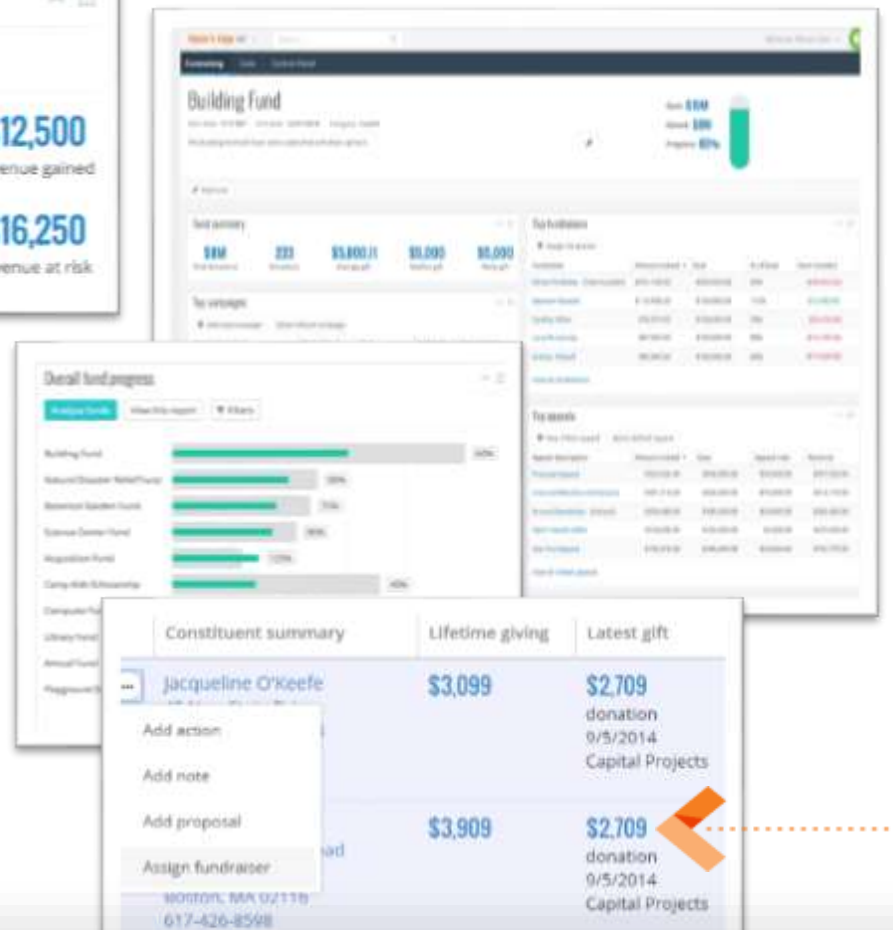

Raiser's Edge NXT
Fundraising
Lists
Control Panel
Alert
Dr. Hernandez will not be giving us a gift this year in 2016.
Mr. Robert Hernandez
aka: Bob Spouse: Jane Smith Fundraisers: Rachel Brean, Sam Yu
Robert has recently moved to Chicago.
Board Member
Major Donor
Volunteer
Membership
Individual
Alert
Edit
Mark as...
Constituent summary
Update contact information
Include inactive
Addresses
425 S Wabash Ave
Chicago, IL 60605-1208
4401 Belle Oaks Dr Ste 100
Charleston, SC 29405-8526
Phone numbers
(817) 624-1234
(312) 997-3301
(817) 624-1234
Email addresses
dryang@net.com
RobertGHernandez@gmail.com
Online presence
@DrBobH
Timeline
Giving
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

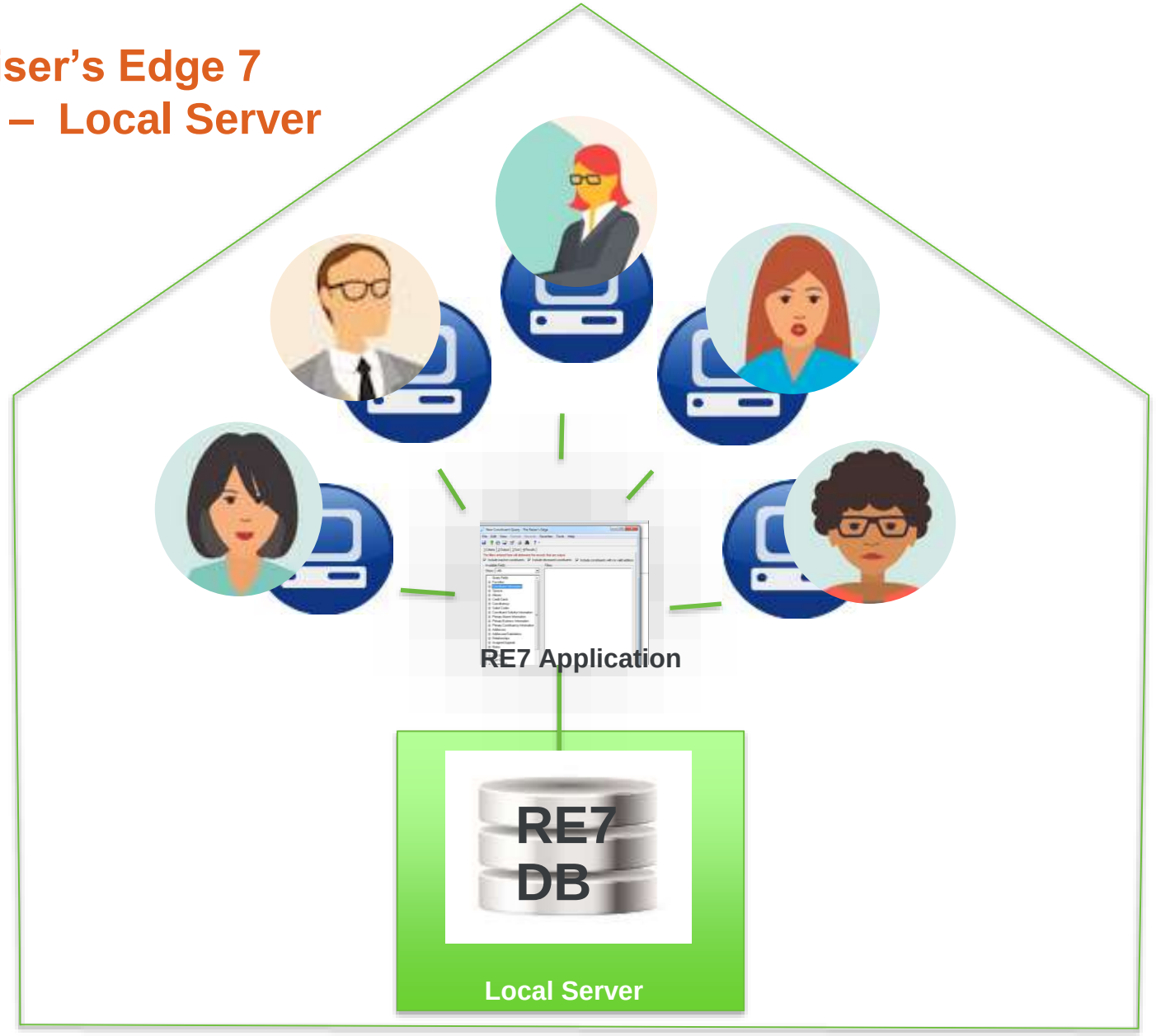
1. www.theNXTera.com
   - Webinars

2. Two roadshows left this year (Canada)
   www.theNXTroadshow2016.splashthat.com

3. Your Blackbaud account executive

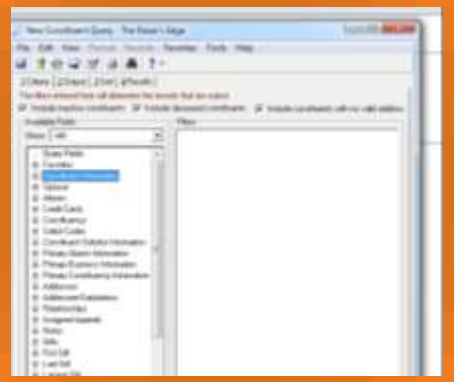
(And do *not* worry about RE 7…Blackbaud will continue to support it for many years to come. RE NXT is an exciting *opportunity,* not a requirement.)

Raiser's Edge 7
Client – Local Server



Raiser's Edge On-Premises Today

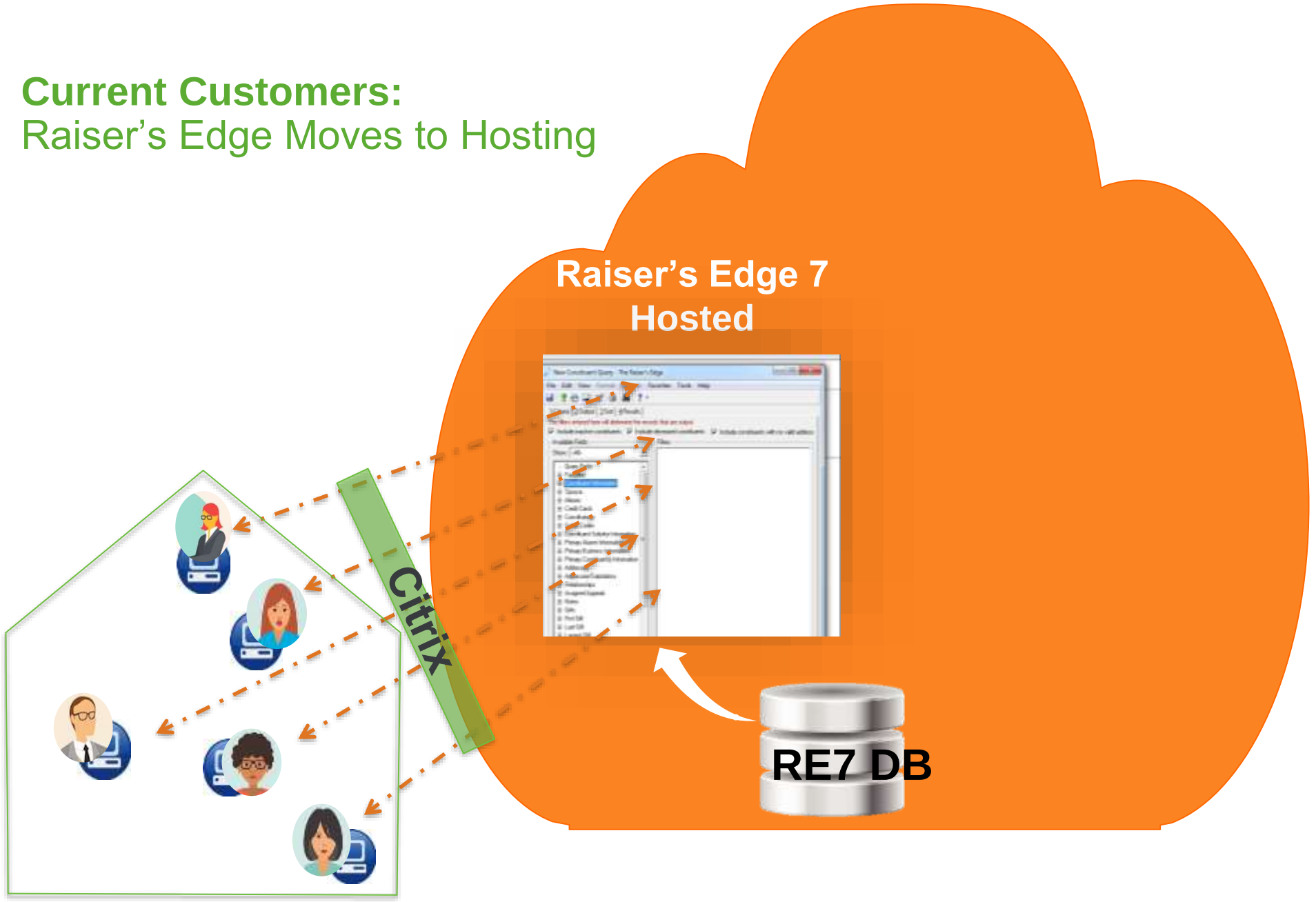
Raiser's Edge 7
Hosted

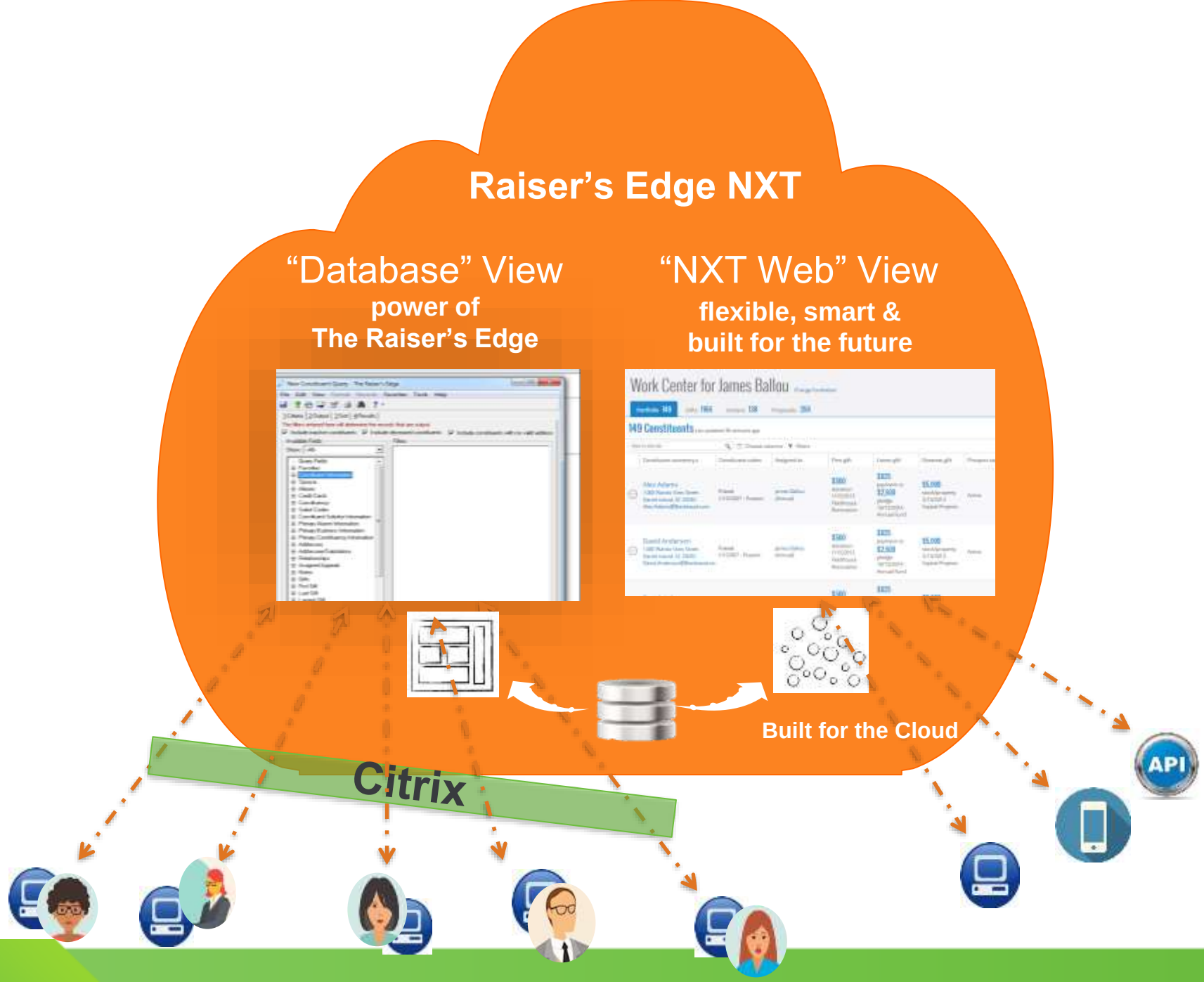


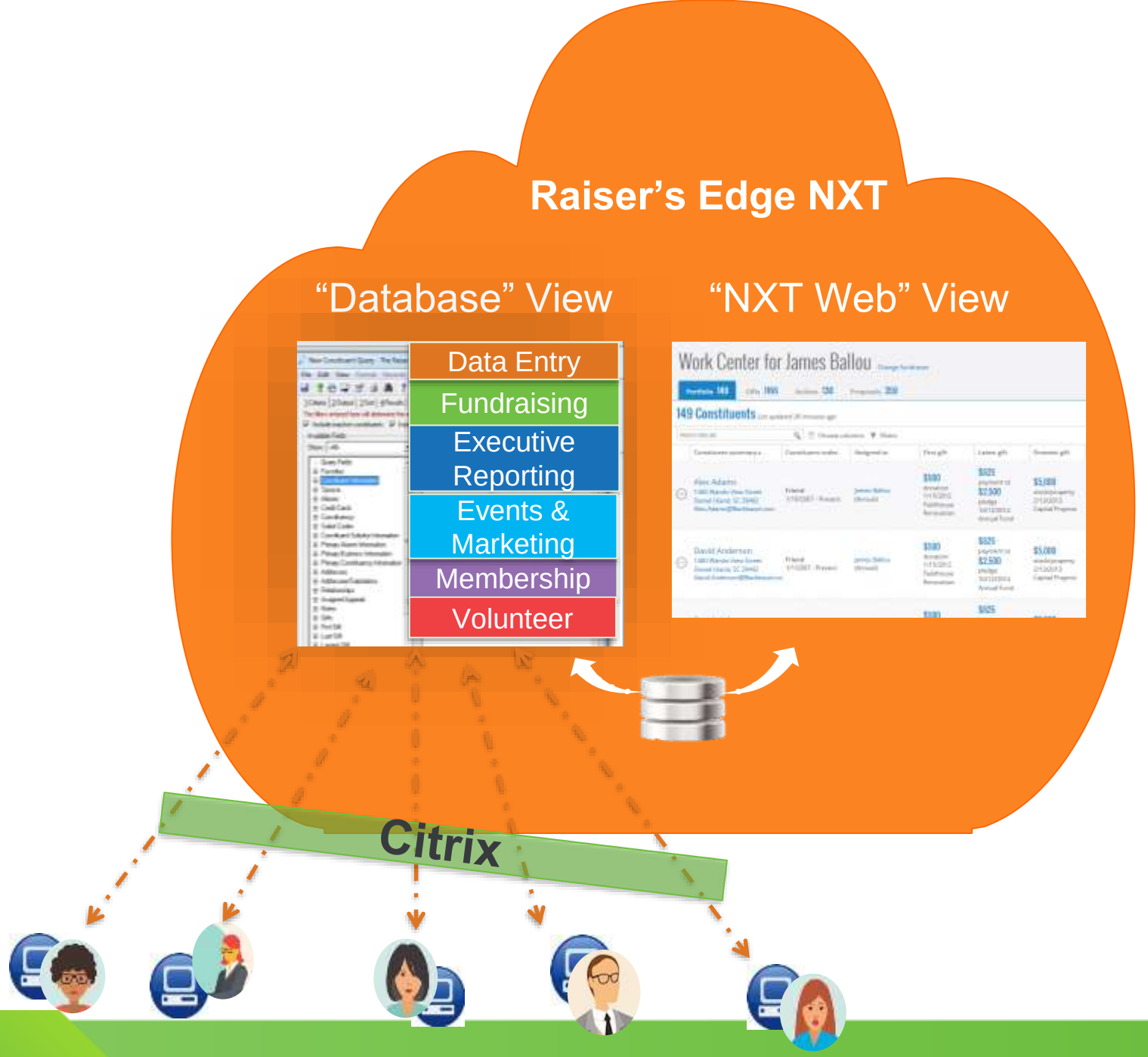
Raiser's Edge 7
Client - Server

Raiser's Edge Moves to Hosting

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
Work Center for James Ballou
149 Constituents
Built for the Cloud
Citrix
API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Data Entry
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Events & Marketing
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Volunteer
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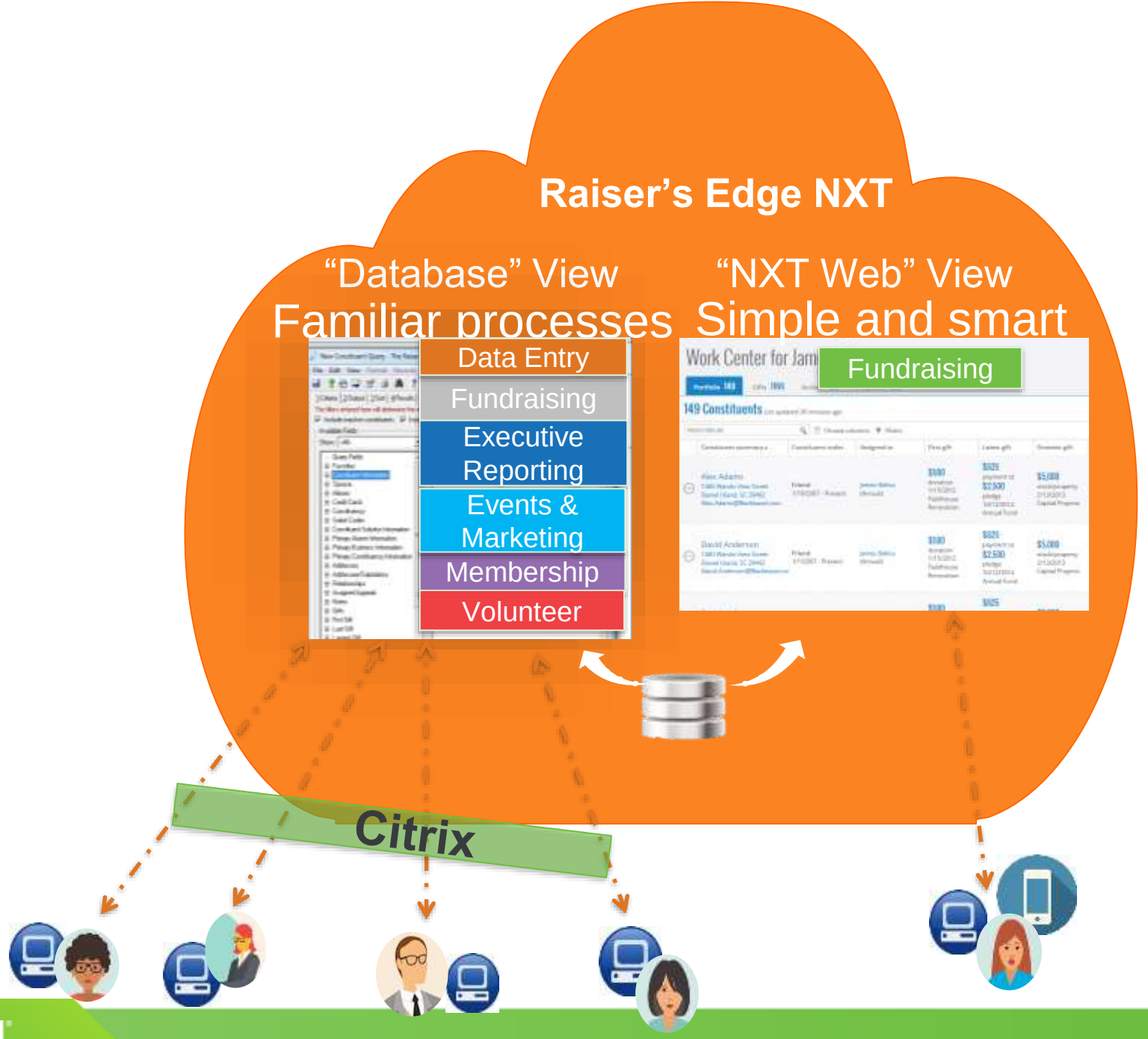
Raiser's Edge NXT
"Database" View
Familiar processes
"NXT Web" View
Simple and smart
Data Entry
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Work Center for Jam
Fundraising
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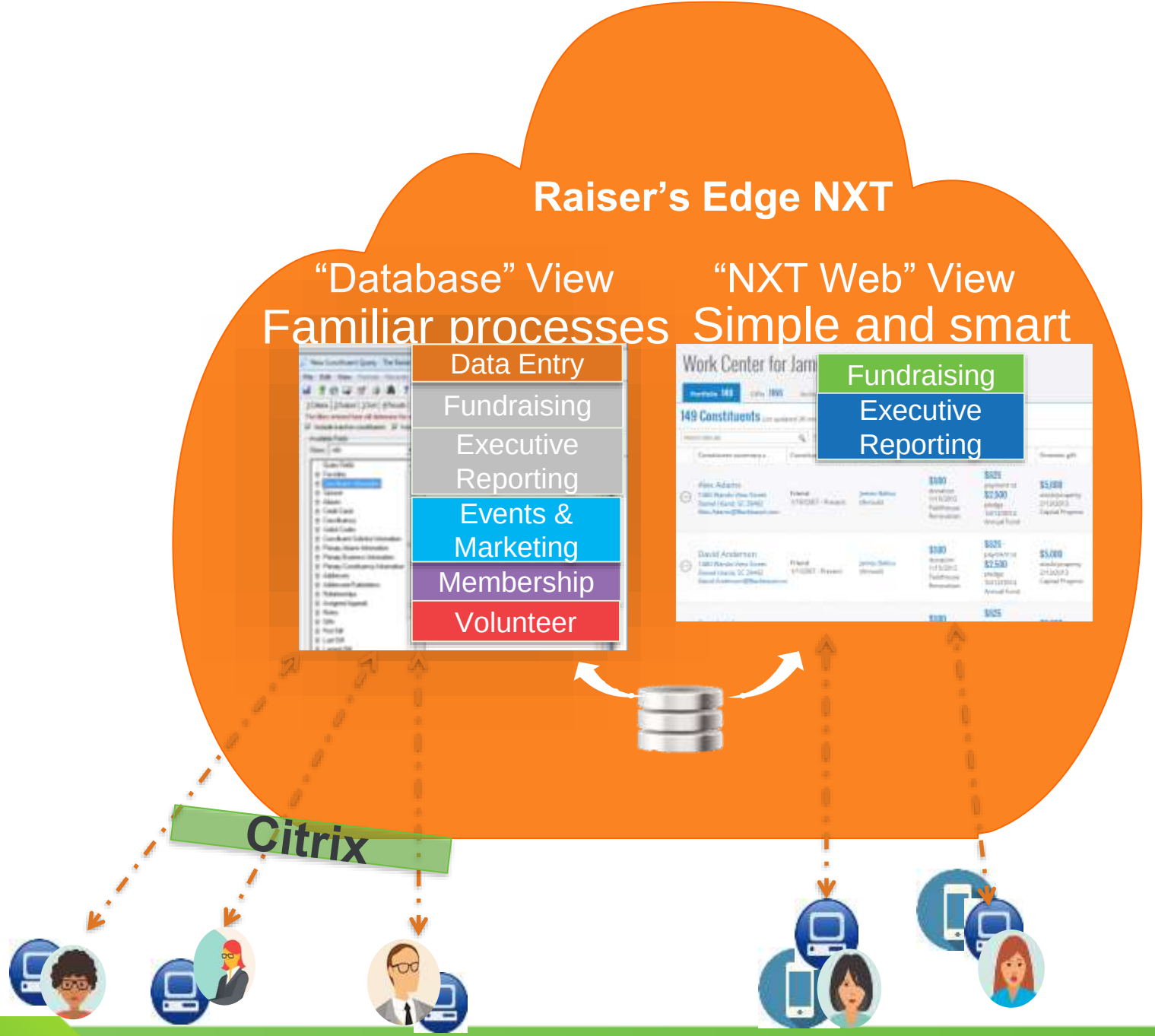
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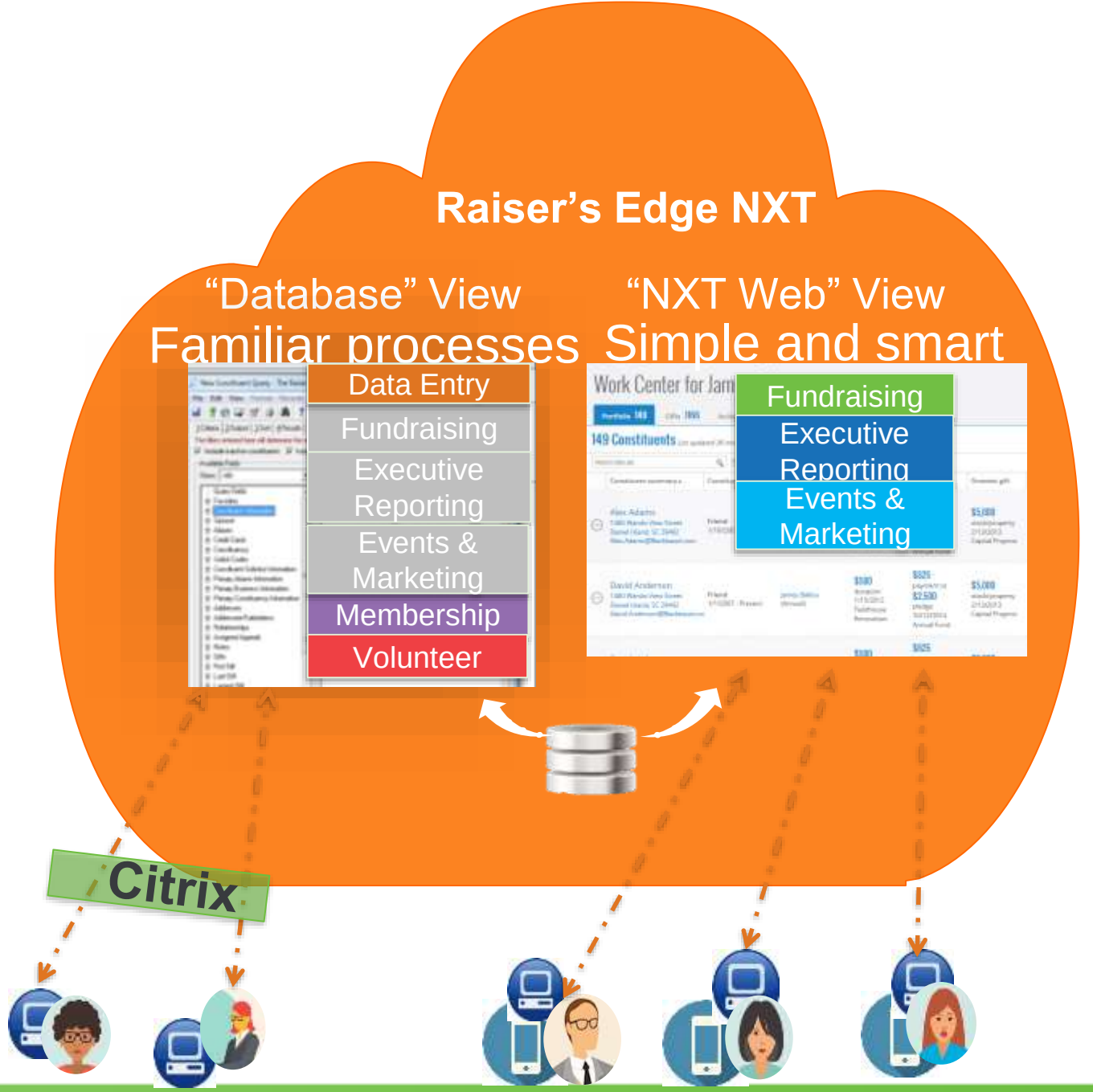
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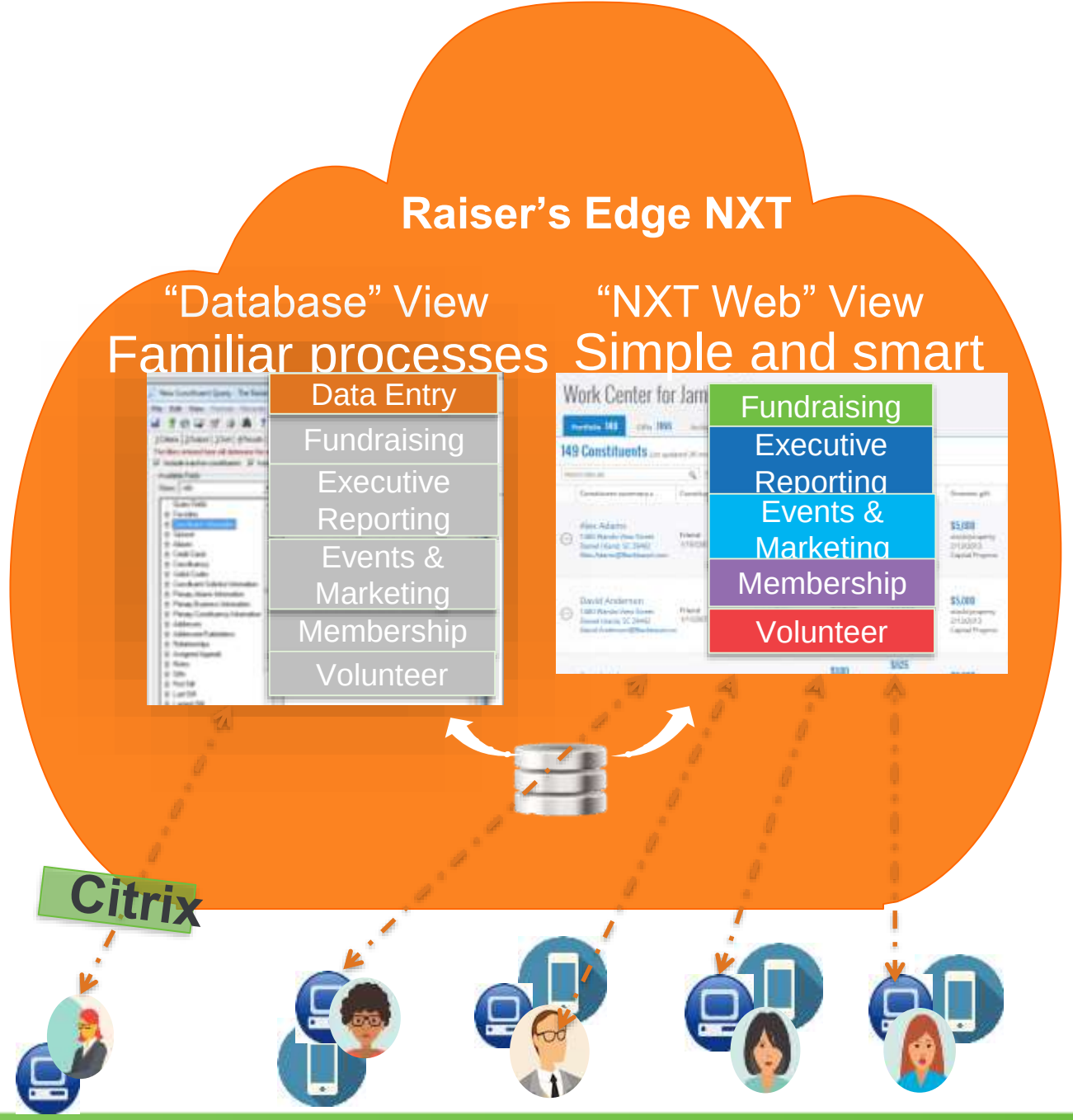
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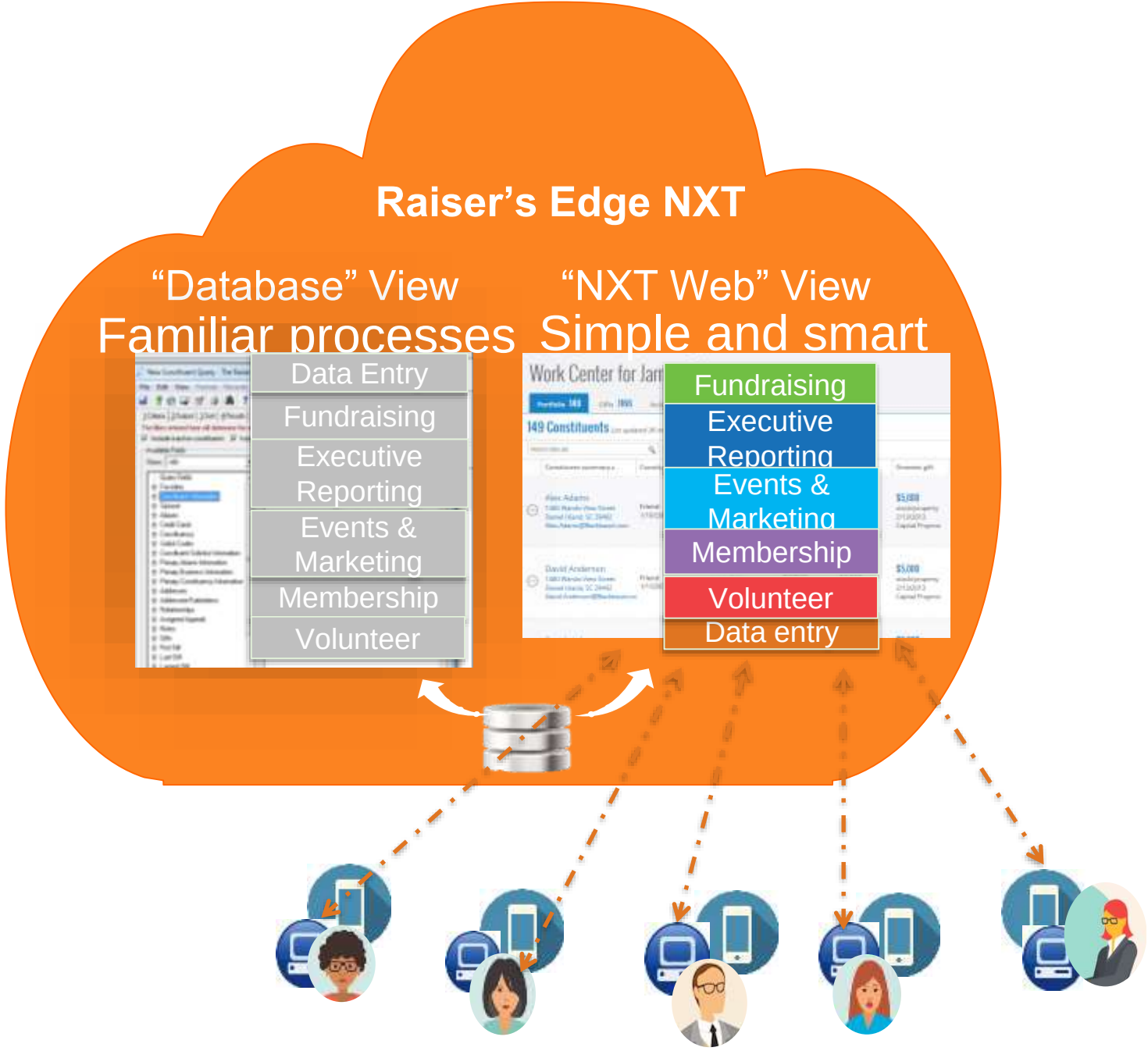
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149 Constituents
Fundraising
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Events & Marketing
Membership
Volunteer
Data entry

Subscription Packages

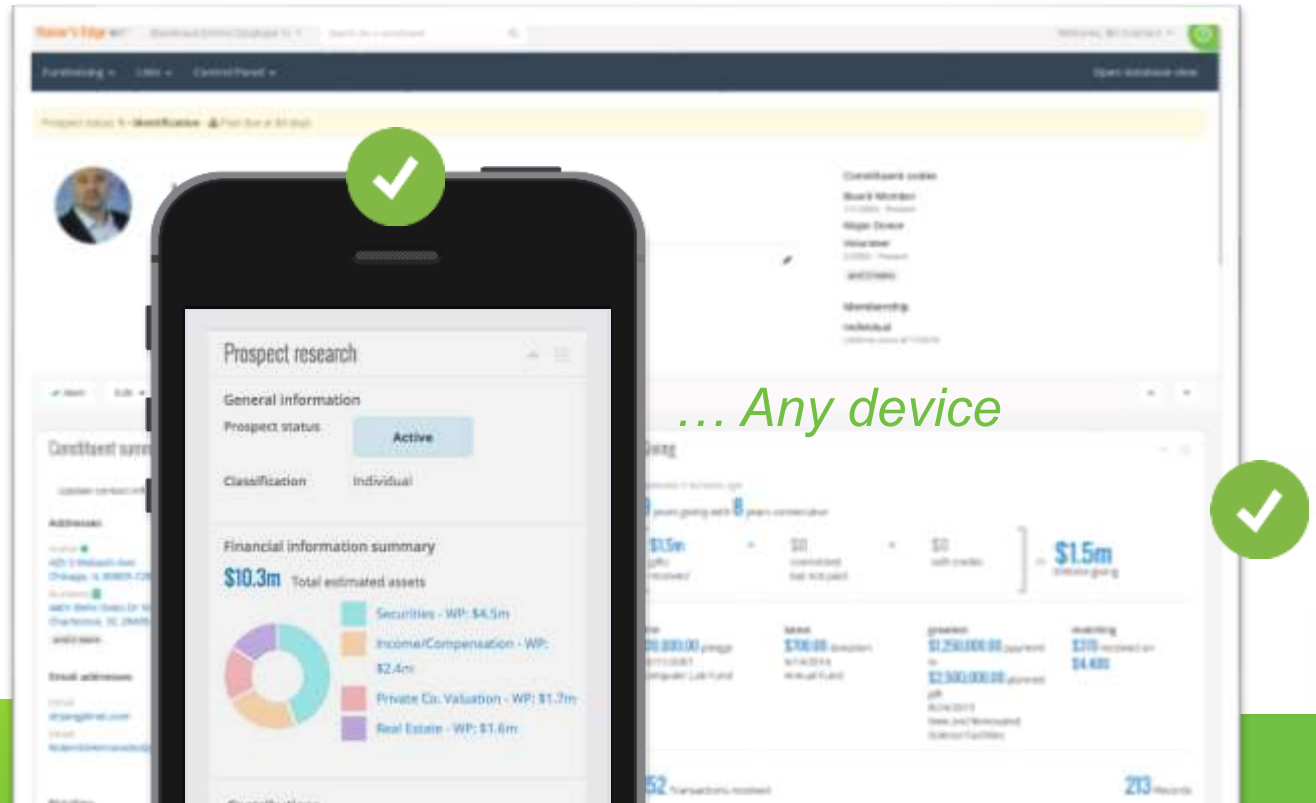
SUBSCRIPTION PACKAGES	STARTER	ESSENTIALS	PRO
CLOUD ACCESS			
Web and Mobile Access	✓	✓	✓
Unlimited Users	✓	✓	✓
Training Videos and Chat Support	✓	✓	✓
FUNDRAISING & SUPPORTER MANAGEMENT			
Email and Online Fundraising	✓	✓	✓
Crowdfundraising	✓	✓	✓
Recurring Gifts (EFT) and Payment Processing	✓	✓	✓
Tribute and Memorial Gifts		✓	✓
Planned Giving		Pick 1	✓
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?

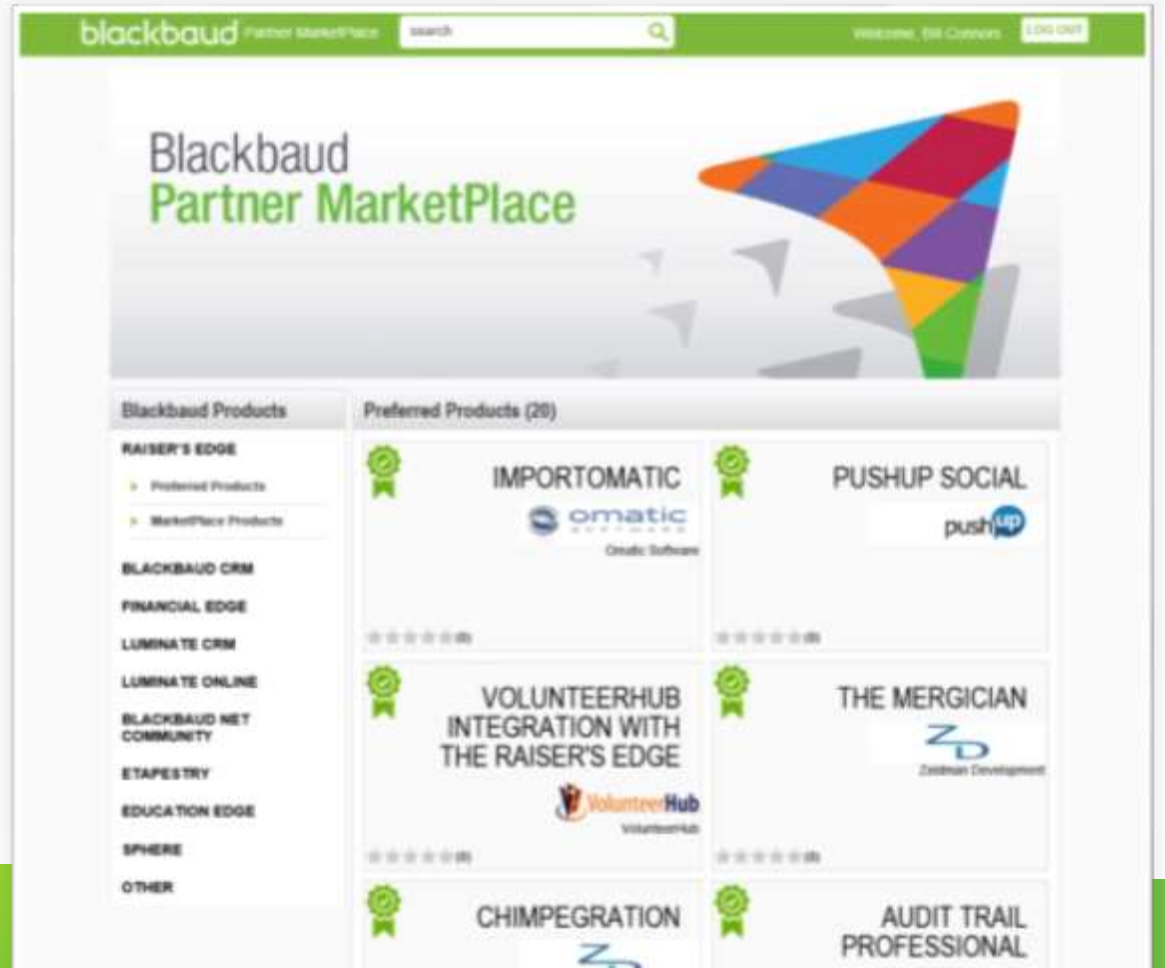
10. *We have something new and exciting!*
9. *Anywhere, any time…*
8. *State of the art design and technology*



… Any device

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

7. The Blackbaud API and Partner Marketplace



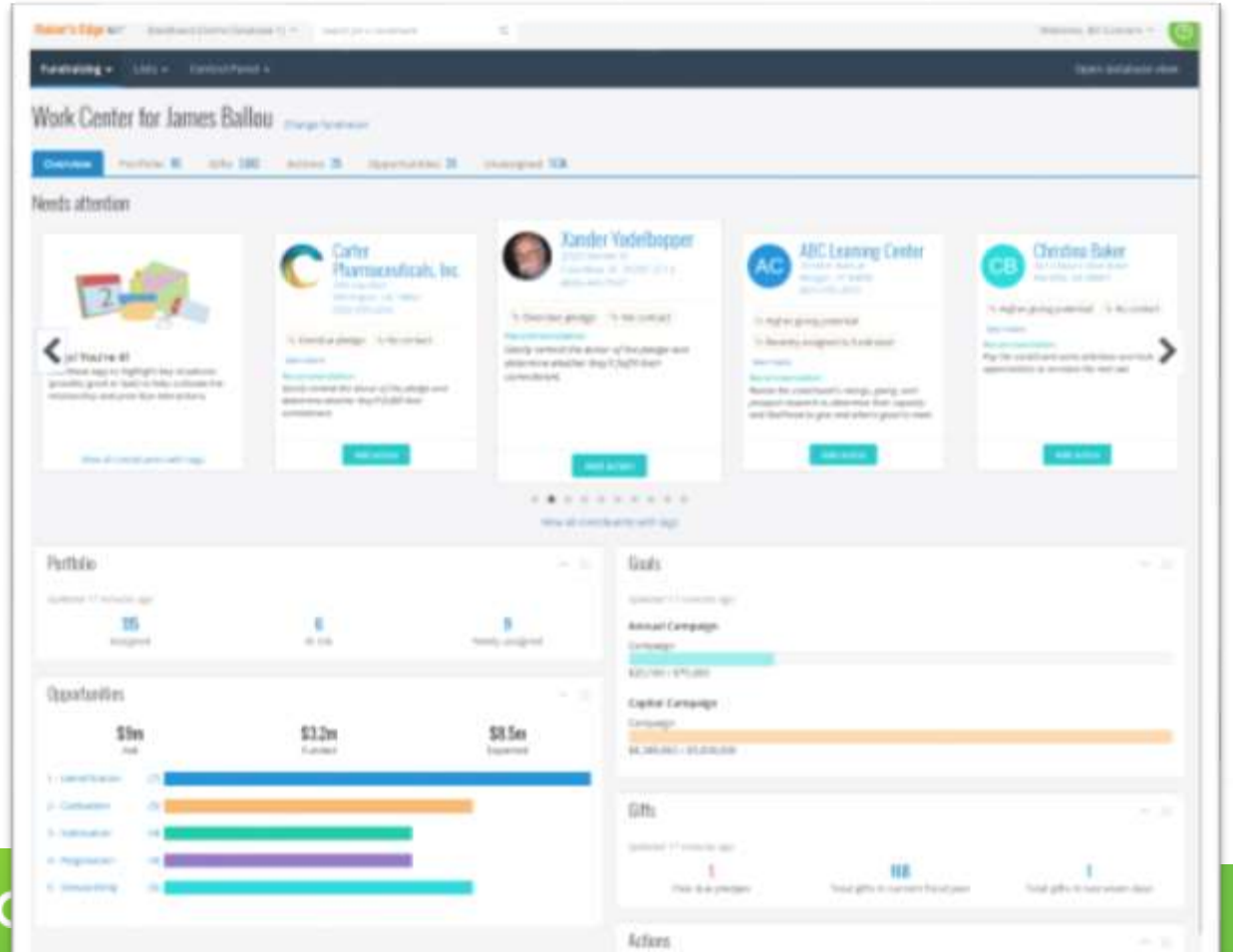
So what does Raiser's Edge NXT mean for you and me?

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…

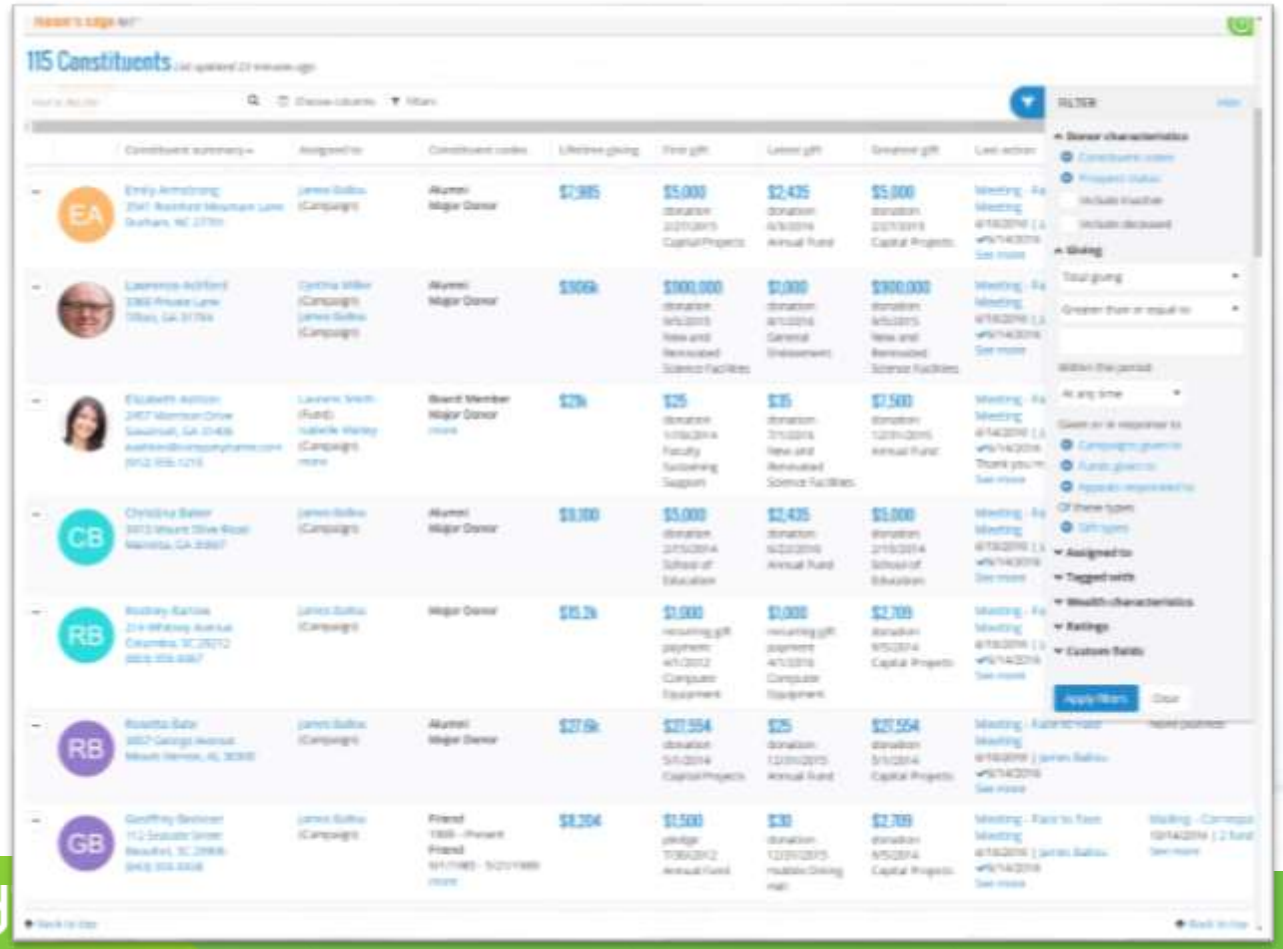
So what does Raiser's Edge NXT mean for you and me?

2. *Prescriptive nature*



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

1. *Role focus starting with fundraisers*



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?

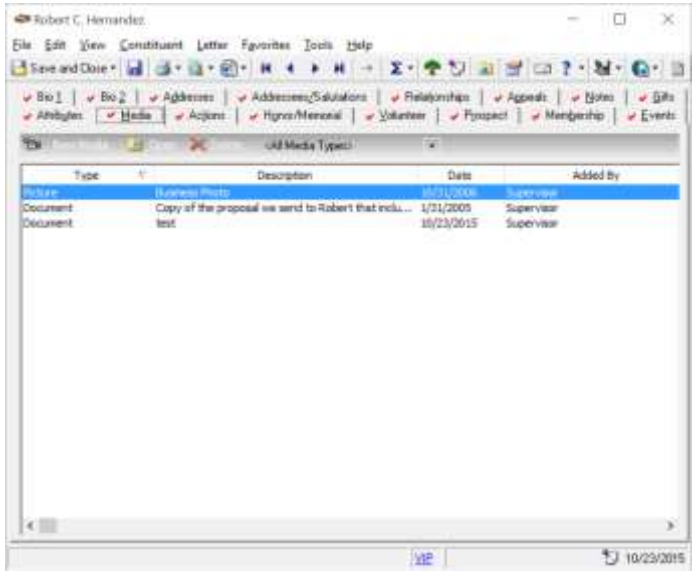
THIS DOES APPLY TO

- *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
Bio 1 Bio 2 Addresses Addressees/Solutions Relationships Appeals Notes Gifts
Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events
All Media Types
Type Description Date Added By
Picture Business Photo 10/31/2006 Supervisor
Document Copy of the proposal we send to Robert that inclu... 1/31/2005 Supervisor
Document test 10/23/2015 Supervisor
VIP
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.

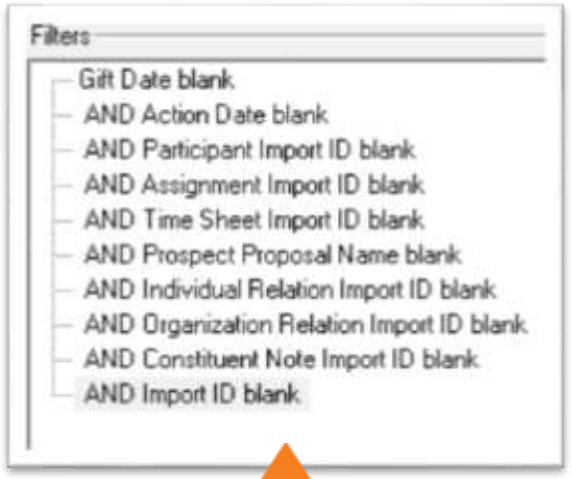
Instead of deleting inactive records:

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?

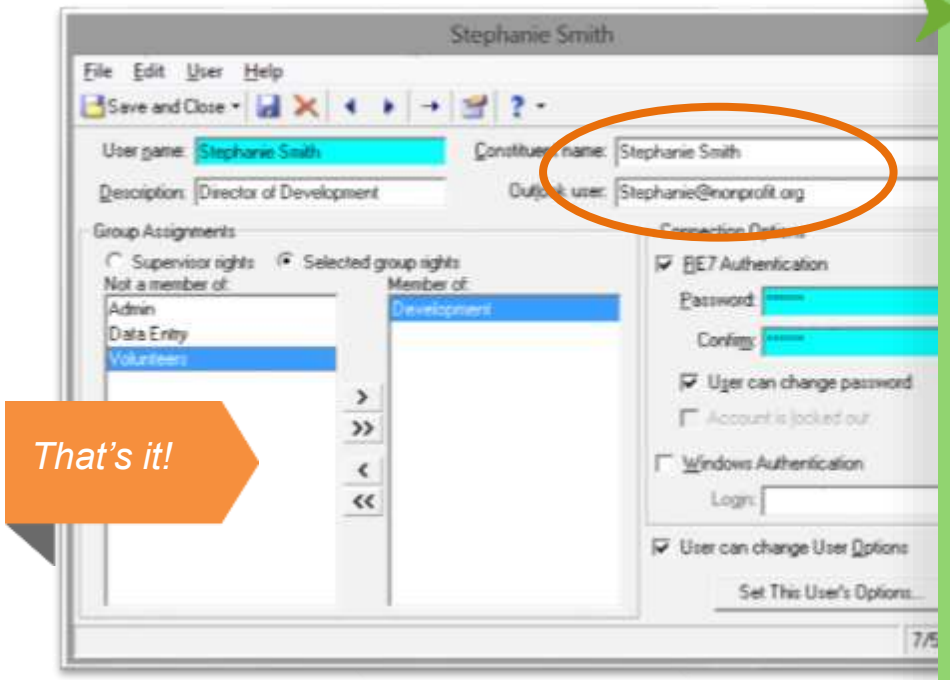


Analysis of a database with 160,000 records

- *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

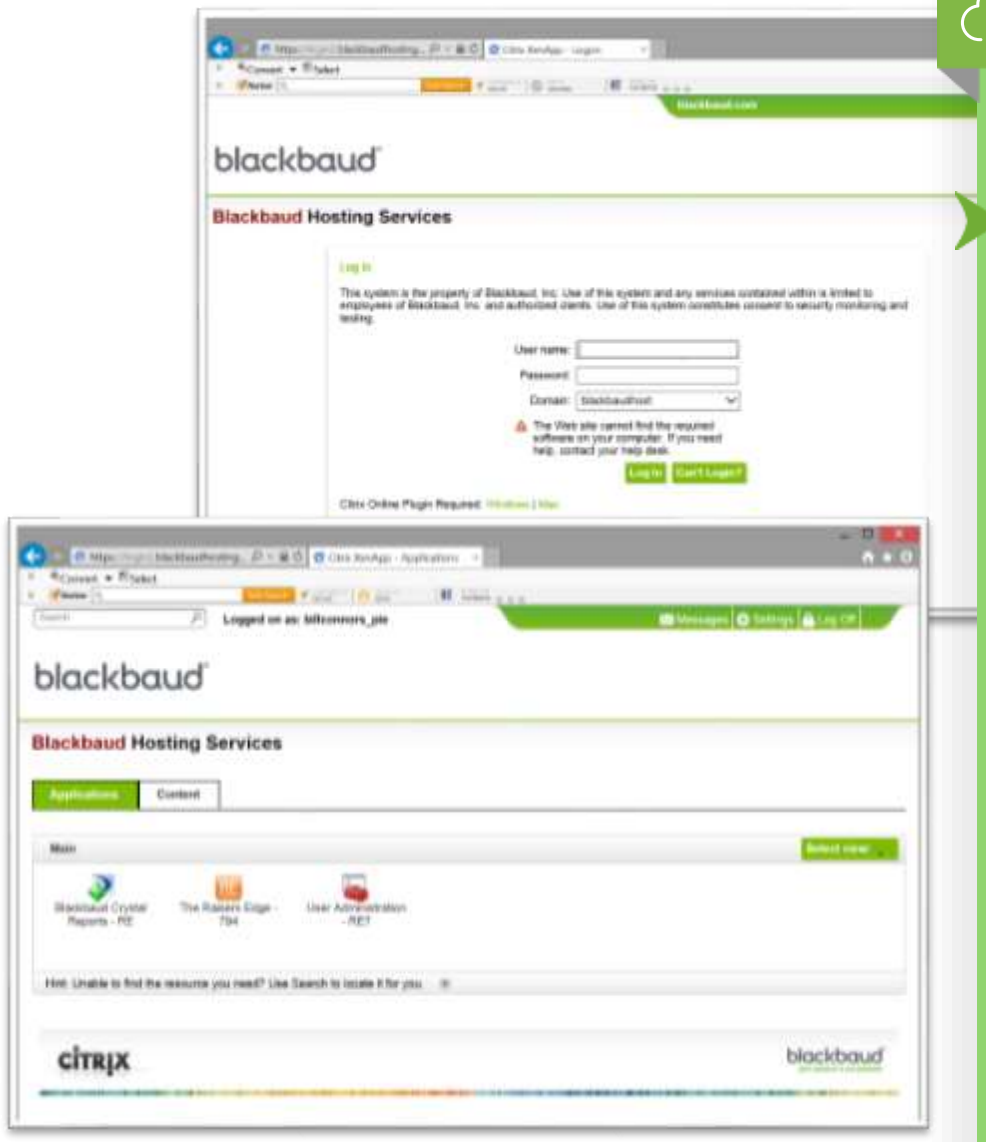


WHAT DO I HAVE TO DO TO GET MY DATABASE READY?

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

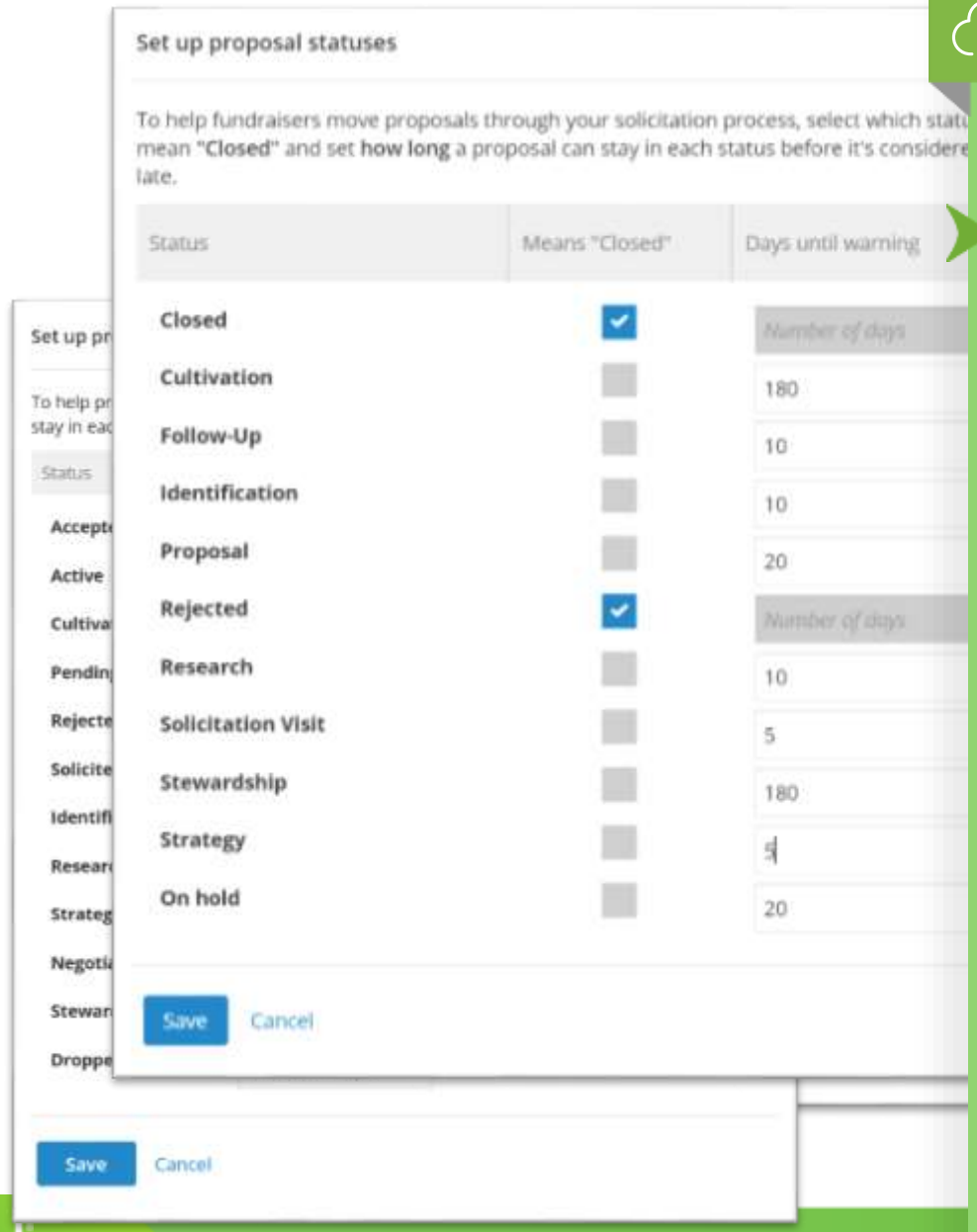
- If you've not yet gone to 7.94/7.95/7.96, grab screenshots of your pivot reports.
- If you're on EE, see KB article 96538.

IMPLEMENTATION



MOVE TO HOSTING

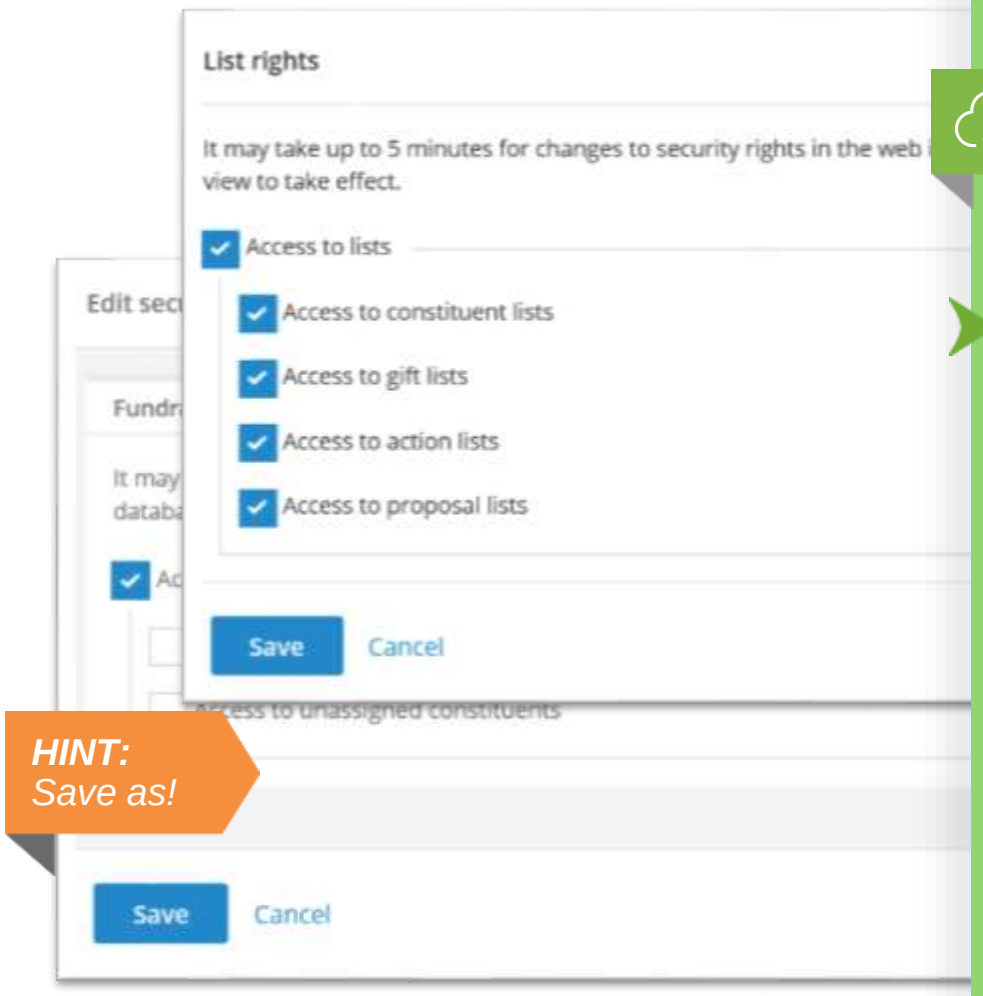
1. *Send Blackbaud a backup*
2. *Upgrade to 7.96*
3. *Install Citrix client*
4. *Set up Hosting accounts*
5. *Train users*
6. *Set up Crystal Reports and user options*



IMPLEMENTATION

NXT WEB VIEW SETUP

Action statuses
Prospect statuses
Opportunity statuses
Revenue settings



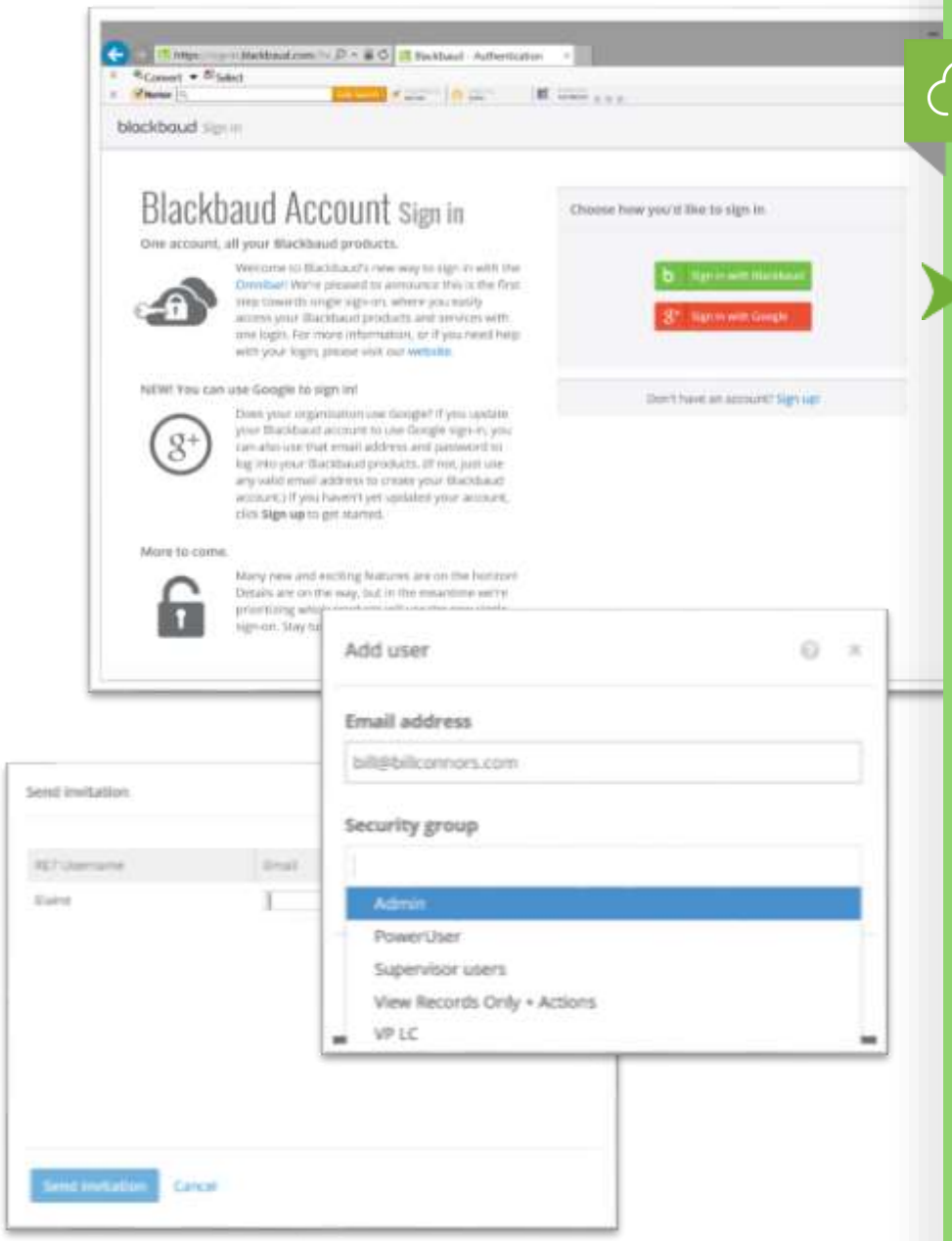
HINT:
Save as!

May require refining your RE security groups

IMPLEMENTATION

NXT WEB VIEW SETUP

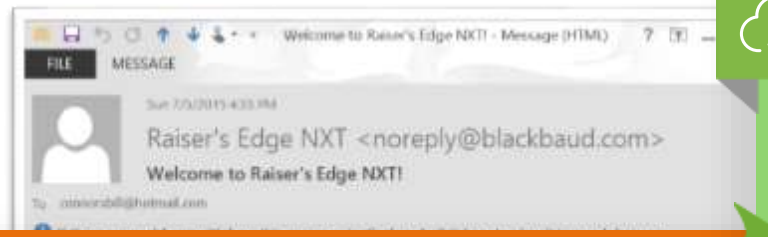
Security groups



IMPLEMENTATION

NXT WEB VIEW SETUP: USERS

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



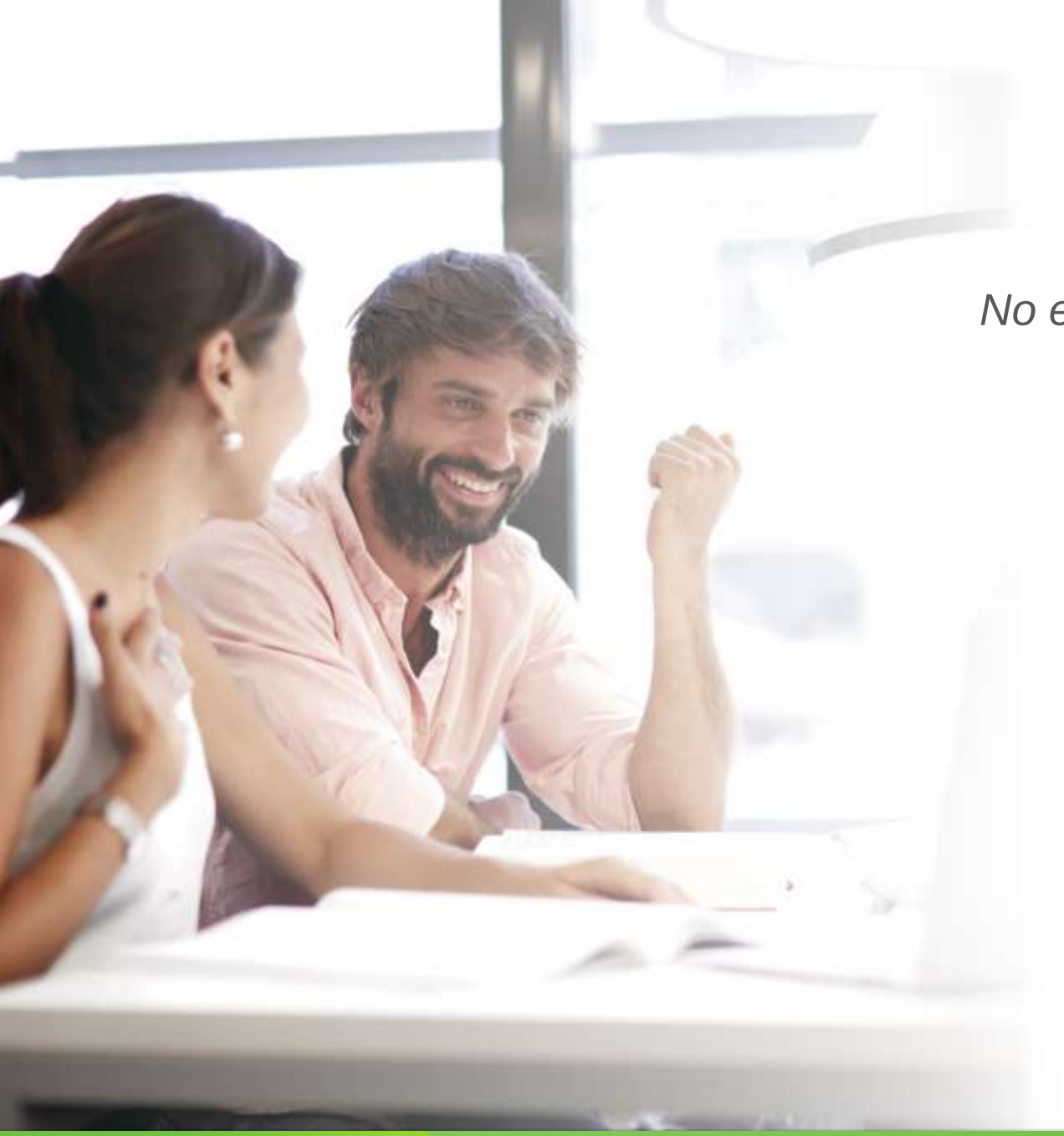
IMPLEMENTATION

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

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*



And that's it…

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

Over time you'll be able to:

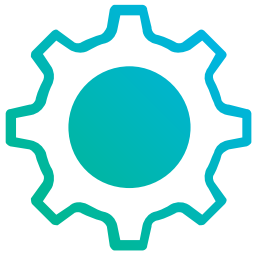
- *Clean up fundraiser assignments and portfolios*
- *Set fundraiser, campaign, fund and appeal goals*
- *Clean up code tables that NXT web view users will be using most (e.g., Action and Note Types)*
- *Clean up policies and procedures regarding Fundraisers, Actions, Notes and Opportunities*

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

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