# Blackbaud Raiser's Edge NXT for Database Managers

IT ISN'T JUST FOR FRONT LINE FUNDRAISERS ANYMORE!

Ingrid Zepp,

Director of Advancement Operations, Ursinus College

Sandy Call Wilder,

Owner, Leading Edge Software Solutions

bbcon® 2019

## Ingrid Zepp

DIRECTOR, ADVANCEMENT OPERATIONS
URSINUS COLLEGE

## Sandy Call Wilder

LEADING EDGE SOFTWARE SOLUTIONS

Have you ever said,
"I'm the database administrator!
I do all my work in the classic view of
Raiser's Edge" ??

If this is you, you're missing out on
**SO MUCH AWESOMENESS!!!!**

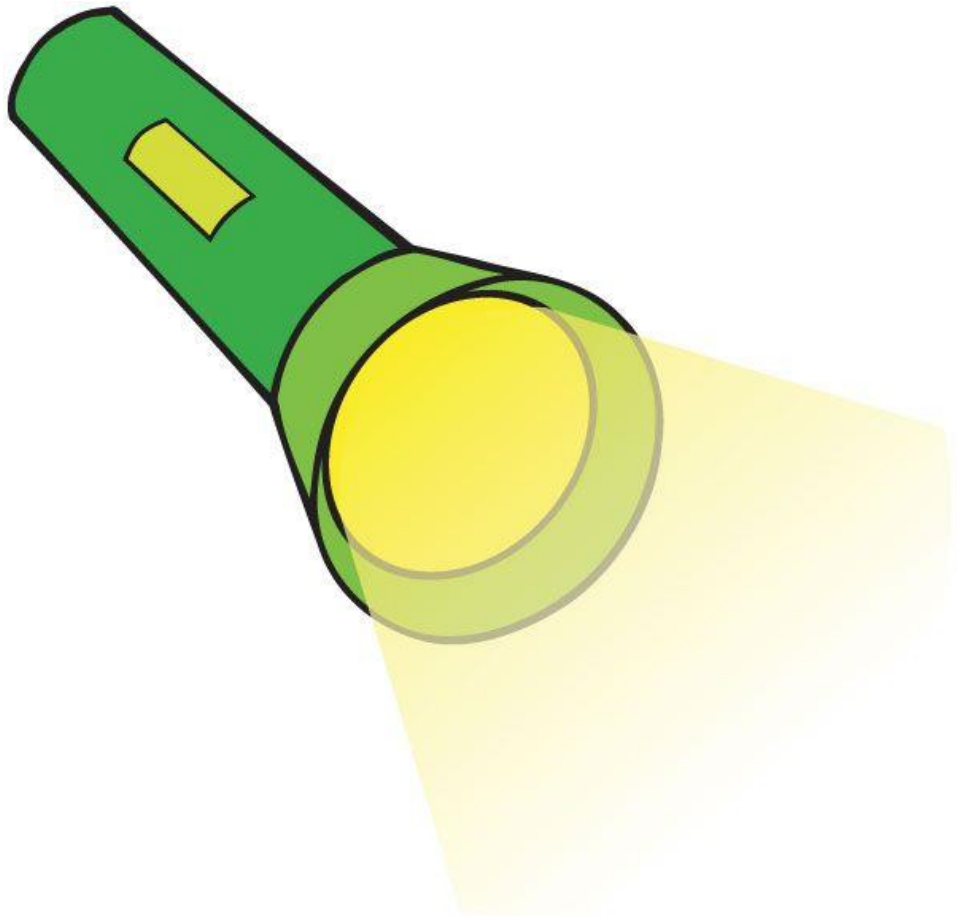
# RE NXT

Experience the awesomeness!

Prepare for the awesomeness!

# PREPARING TO LIGHT UP RE NXT (WEB VIEW)

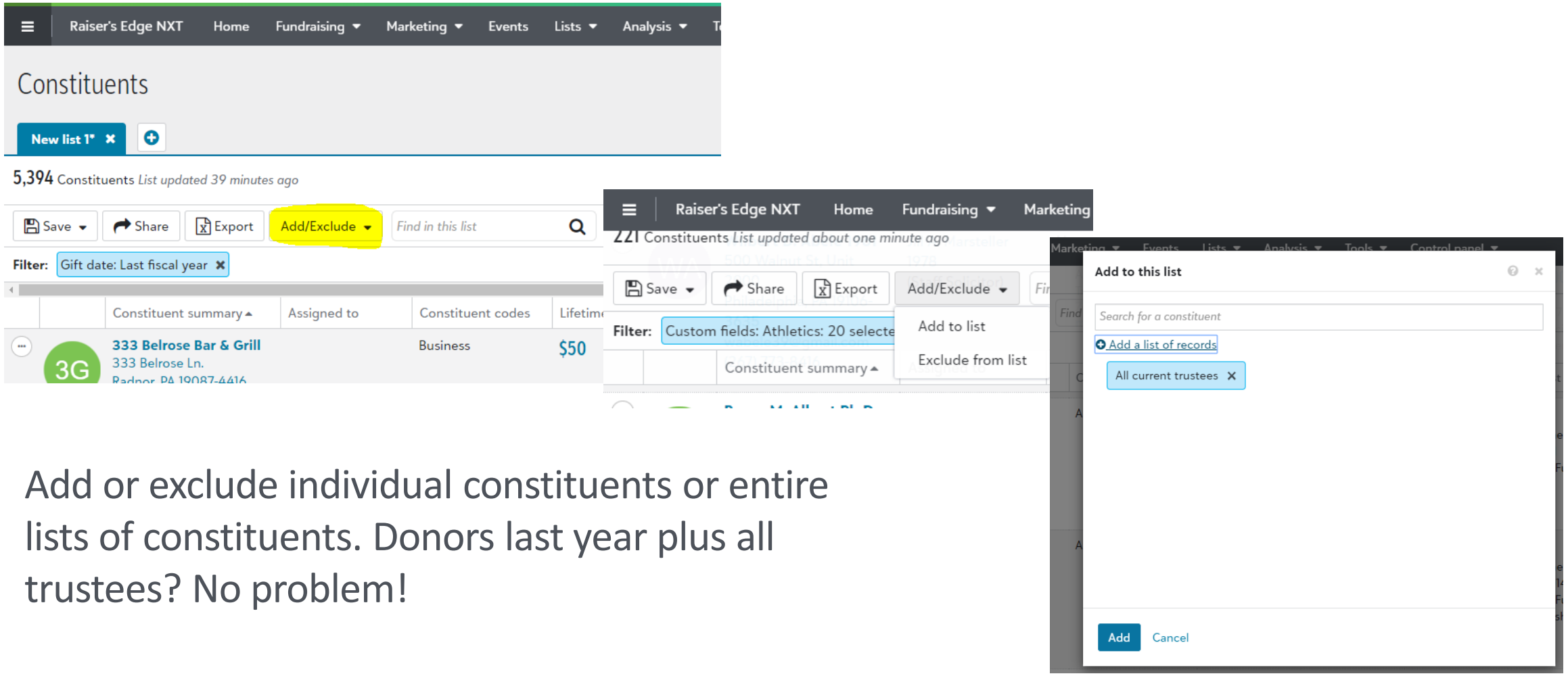
- Audit security carefully in both database view and web view. Who can/should have rights to:
  - Add/edit information (addresses, Constituent codes, etc.)
  - Add/Edit Gifts
- Double check phone types and formats
- Check on Completed status  of past actions
- Active Solicitors/Fundraisers
- Fundraiser's portfolios, particularly relationships for former employees (end dates)



Announcing the end of playing
PASS THE SPREADSHEET!!!

# NXT LISTS
# TO THE RESCUE!!!

# Create your list then customize it with Add/Exclude

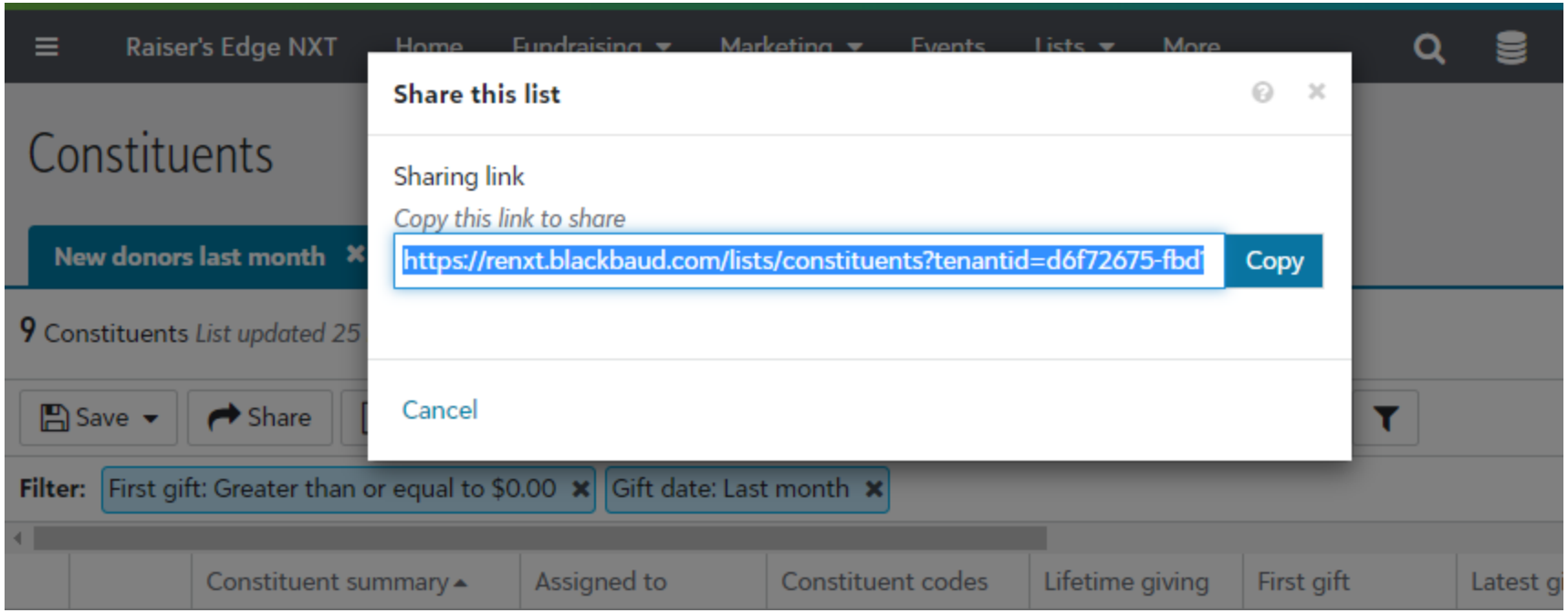



Add or exclude individual constituents or entire lists of constituents. Donors last year plus all trustees? No problem!

# EXPERIENCE THE AWESOMENESS!

## Share and review mailing lists electronically

Instead of circulating an Excel spreadsheet, create (or bring) the list into Raiser's Edge NXT, and just e-mail the link to those who need to review it.



# THINGS TO KEEP IN MIND

**LISTS IN NXT….**

- Static vs. dynamic
- Limited fields for filters and columns

**WHY THIS IS STILL AWESOME FOR YOU!**

- Save time by not having to chase down the “list” – or the five different printed copies of it!
- No more “Has so and so reviewed the list?”
- Final product is usable list/group for global adds/import instead of some random Excel spreadsheet or sheets of paper

# PREPARE FOR THE AWESOMENESS!!!

# PREPARE FOR THE AWESOMENESS

- Create (and maintain in DBV-remember, they're static!) lists of
  - Usually/always include
  - Usually/always exclude
- Examples:
  - Board
  - Alumni
  - Elected Officials/Community leaders
  - Staff
  - Solicit Codes
  - Society level donors

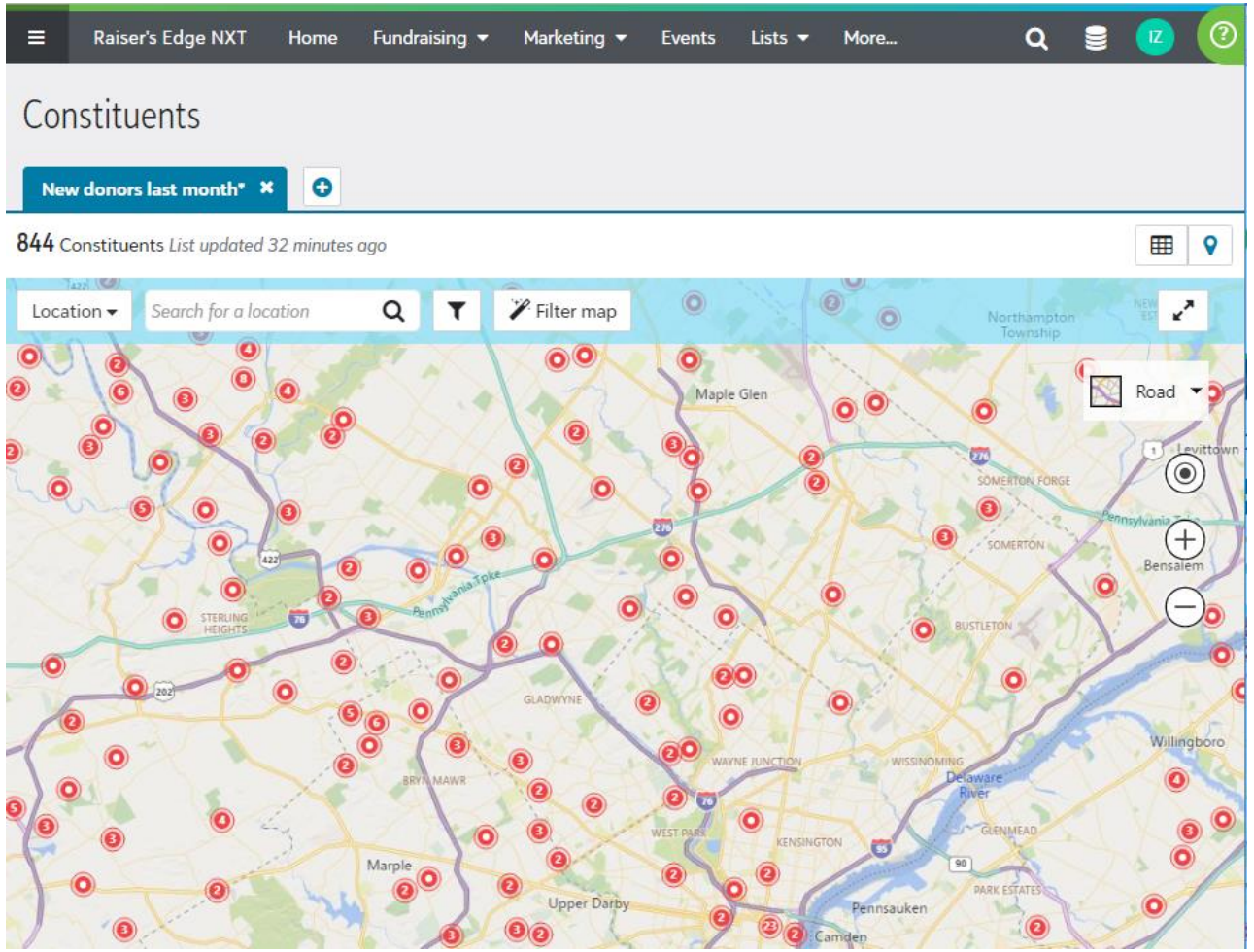
Experience the Awesomeness of Lists Part 2:

# EASILY CREATE LISTS BASED ON LOCATION!

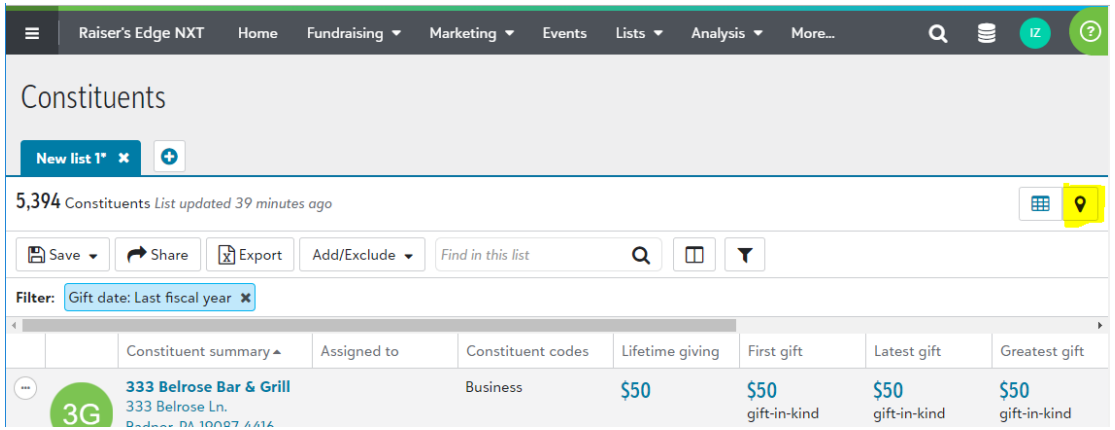
# Easily create lists based on geographic proximity

See where those in your list (or query) live, then select those in the area you need for an invitation or for planning a trip.

Draw a rectangle (or a custom shape!) to limit your list.

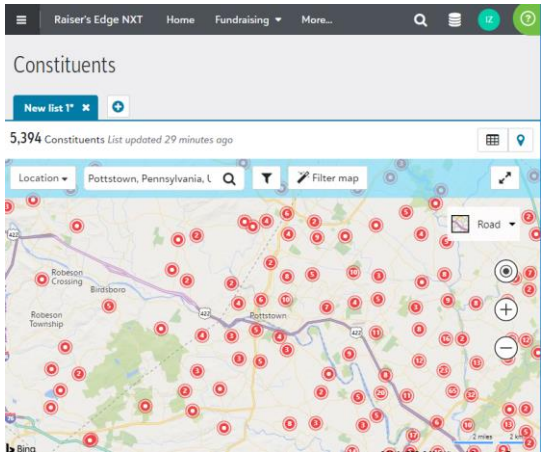


# Create your list, then click on the “map pin” icon

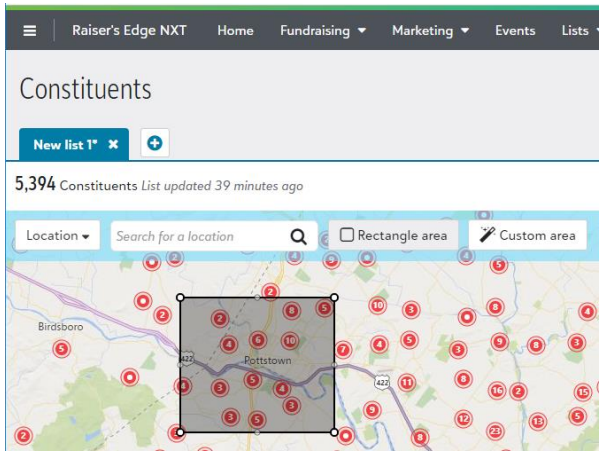



Select by location (town, address or even a constituent in the list); draw a rectangle or draw a custom shape. Then just apply the filter to only include those constituents in the list!

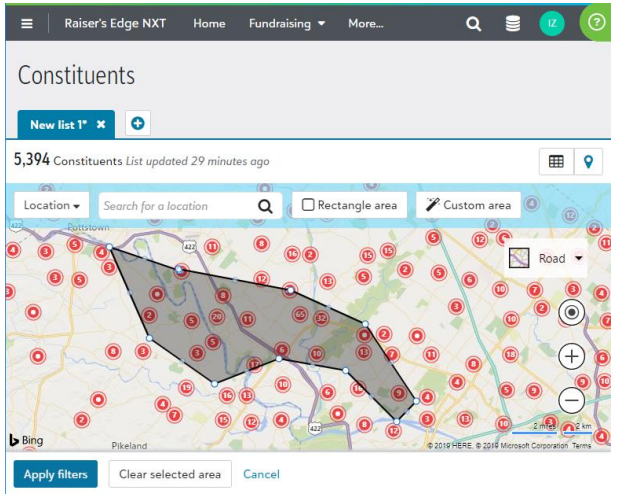
## Location




## Rectangle




## Any custom shape



# WHY IS THIS AWESOME FOR YOU?

- No more trying to query on ZIP codes
- Can customize, crossing by ZIP
- Helpful when deciding where in town to hold an event
- Helpful for traveling fundraisers to plan trips
- Eliminates wasting your time using trial and error queries trying to get to the constituents your fundraisers want

# PREPARING FOR AWESOMENESS

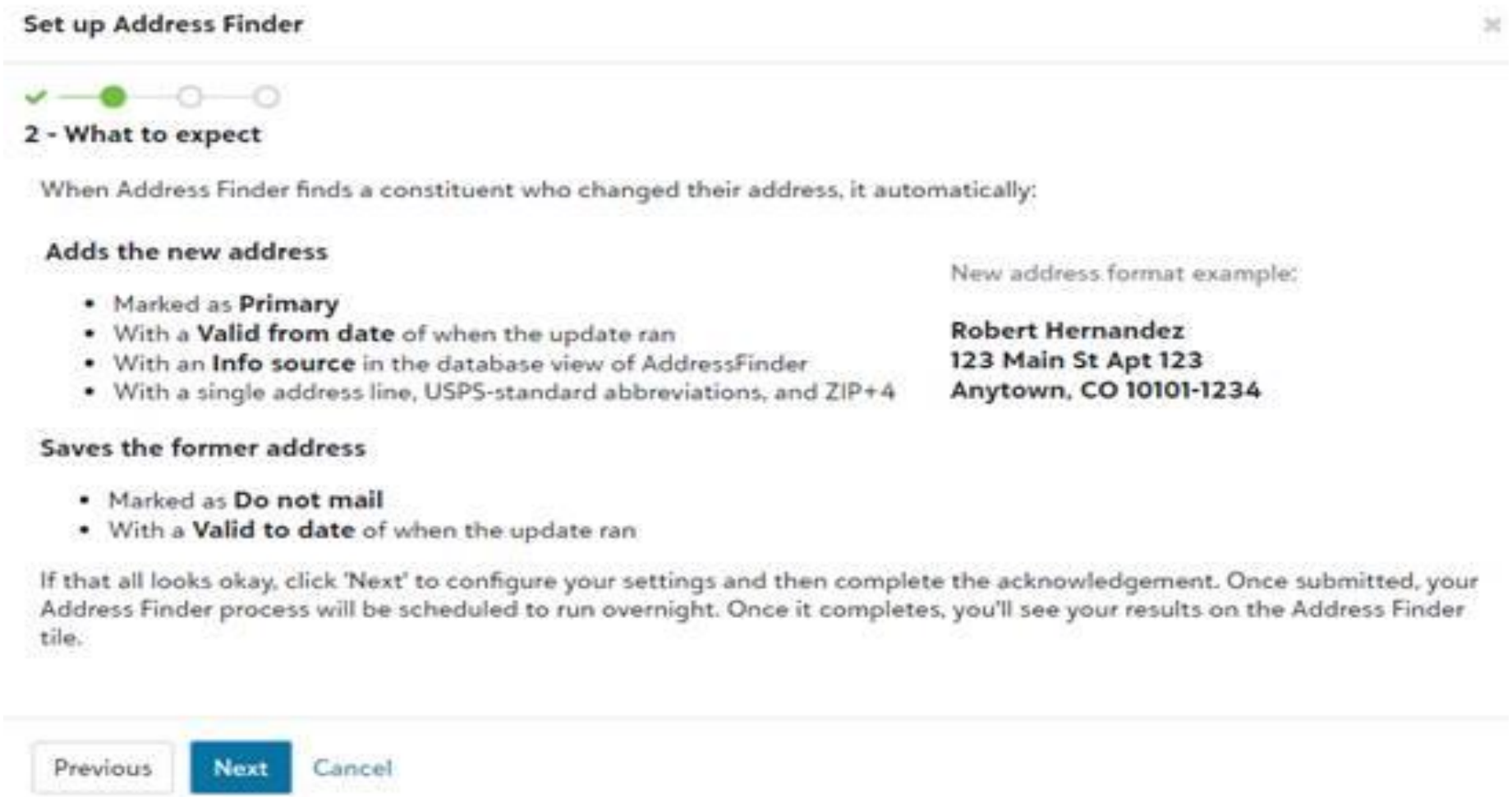
- Keeping mind this is a *starting* point for you as the DBM. You're not completely out of a job ☺
- The final data *probably* still comes from database view
- Things like:
  - Address processing
  - Head of household processing
  - Excluding Solicit codes (*potentially*)

# EXPERIENCE THE AWESOMENESS!!!

Experience the Awesomeness of Automated Processes:

# HANDS OFF
# NCOA ADDRESS UPDATES!

# Automatic Address Finder Updates



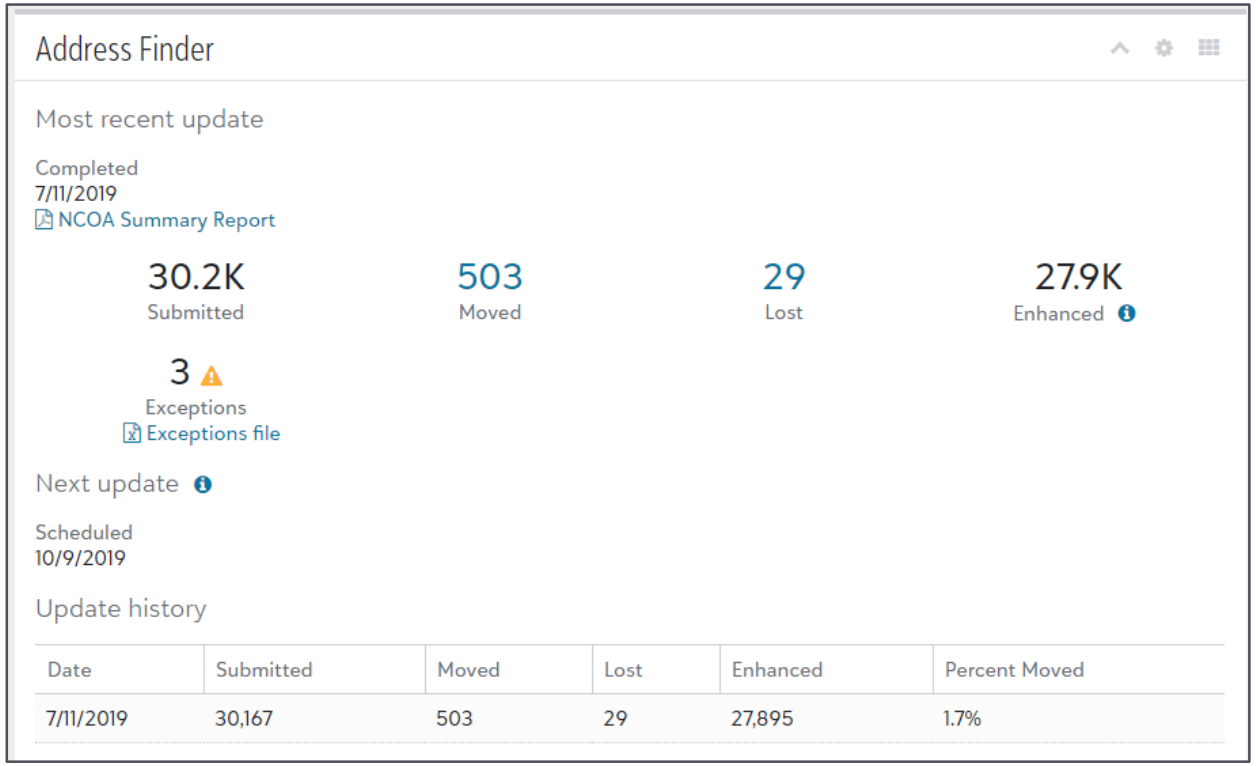
# Things to know about Address Finder

- **You** control the settings
  - Record to include – all or specific constituent records
  - Choose whether to retain the address type for moves
  - Choose what address type to use for new addresses

- Information updates automatically
  - Moves – new address added, old one marked do not mail
  - Updates – zip+4, apartment number, etc.
  - Updated addresses maintain your formatting; new addresses use standard USPS formatting

# Address Finder – what it gives you

- Report in Raiser's Edge NXT with links to records changed
- Runs automatically every 90 days



# PREPARE FOR THE AWESOMENESS!!!

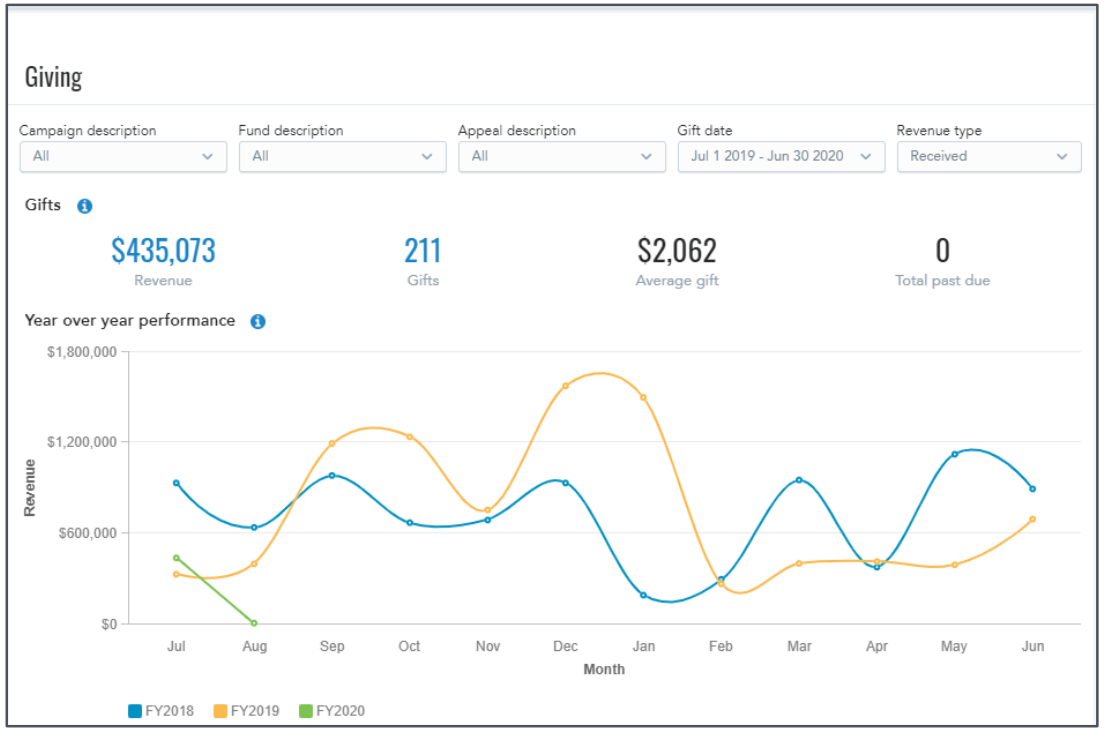
Nothing to see here!
Just set it up and GO! ☺

# EXPERIENCE THE AWESOMENESS!!!

Experience the Awesomeness of Updated Reporting:

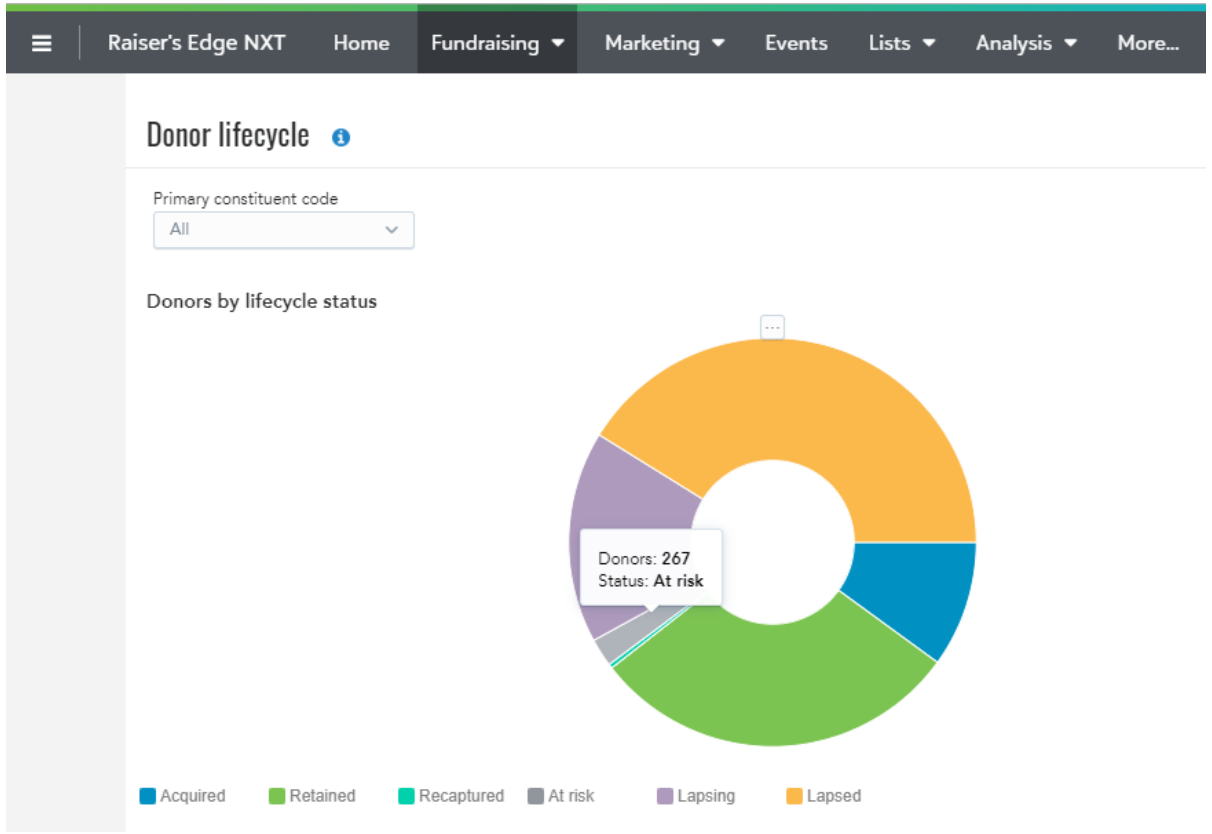
# Prebuilt and Custom DASHBOARDS

# Using prebuilt dashboards - giving overview



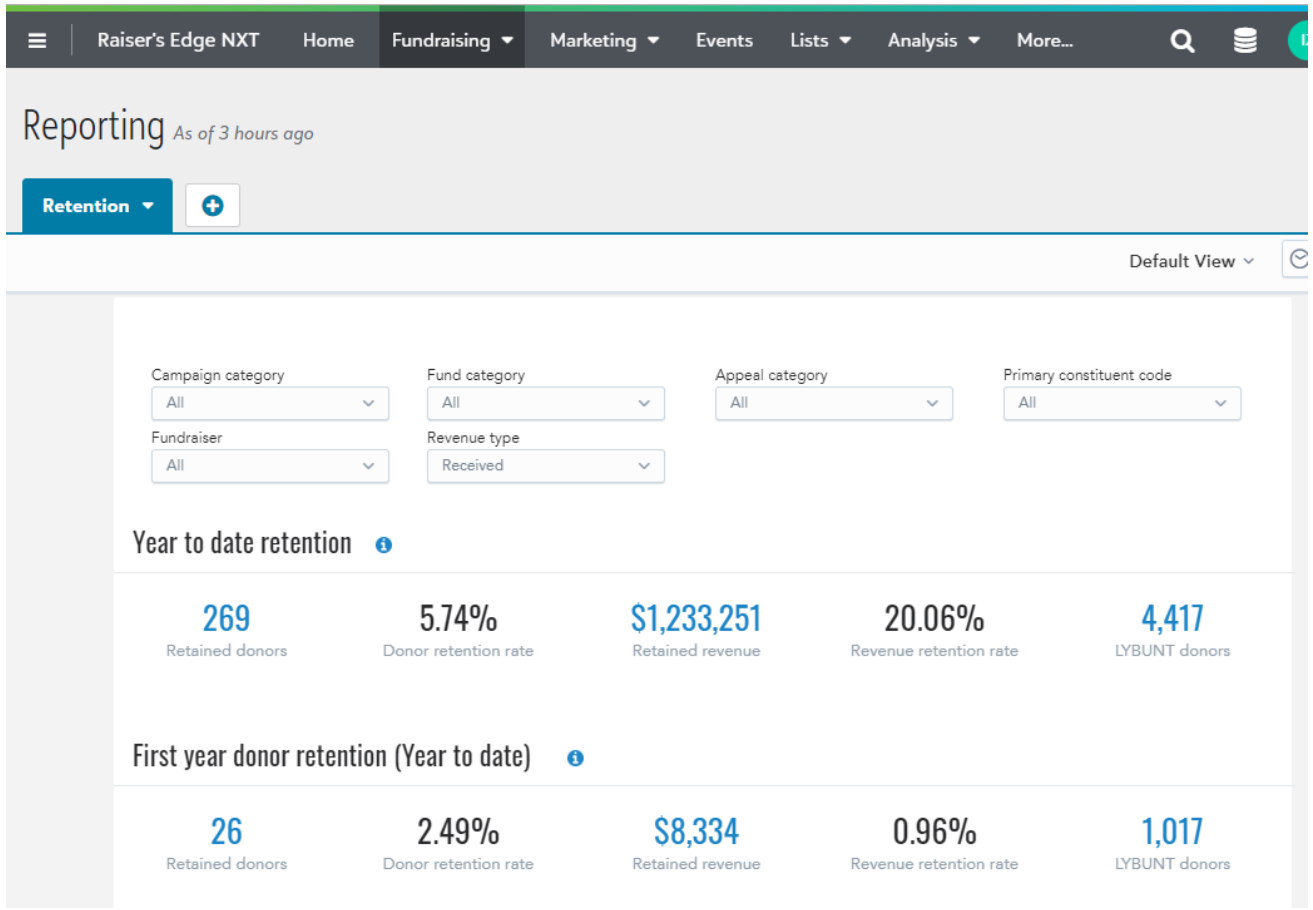

- Compare year-over-year
- You control whether you measure new gifts & commitments or gifts received
- Select only certain campaigns, funds or appeals
- ACTIONABLE information – click through for a list of gifts, or to see overdue pledges

# Using prebuilt dashboards - giving overview donor lifecycle




- Easily look at your donor pool as a whole
- Drill down for details
- Click a segment for a live list of constituents included in the category
- Uses Blackbaud's definitions for each grouping

# Using prebuilt dashboards – donor retention




- Very valuable insights, especially for Annual Fund directors
- Actionable click throughs to create/analyze lists

# WHY THIS IS AWESOME FOR THE DBM

- Donor Retention and Recaptured dashboards eliminate a series of complicated queries on your part!
- Empower your fundraiser’s with data at the click of a mouse!
- Quickly identify new donors for additional attention and follow-up without any work on your part

# PREPARE FOR THE AWESOMENESS!!!

# Things to think about with Dashboards and Analysis

- Define revenue types
  - Received
  - Committed
  - Recognition
- Caution around Gift attributes
  - Only available in Gift Lists
  - Only as an Include, not an Exclude
- Payments on multi-year pledges
  - No filtering on which pledge payments are included in revenue types

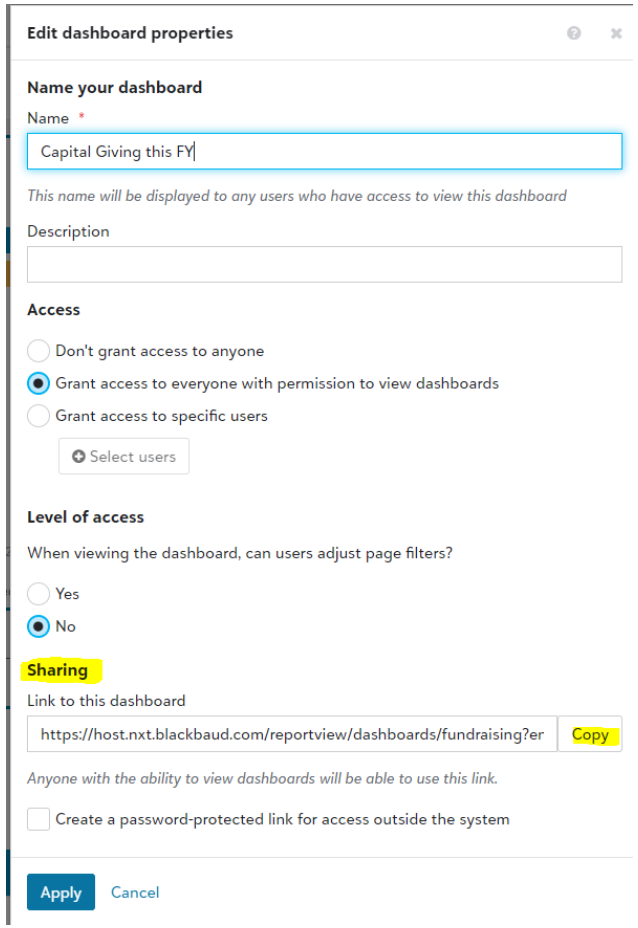
# In database view

To encourage and empower your team to use NXT on their own (and save you TONS of time!), consider making meaningful use of Category field for:

- Campaigns
- Funds
- Appeals

# Share selected custom dashboards securely

You can choose to share a custom dashboard securely even with those who do not have access to your database!



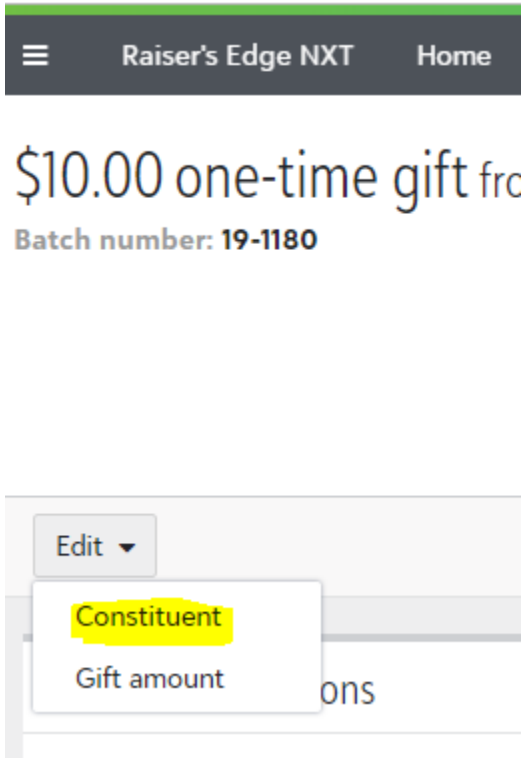
# Things to think about with secure dashboard sharing

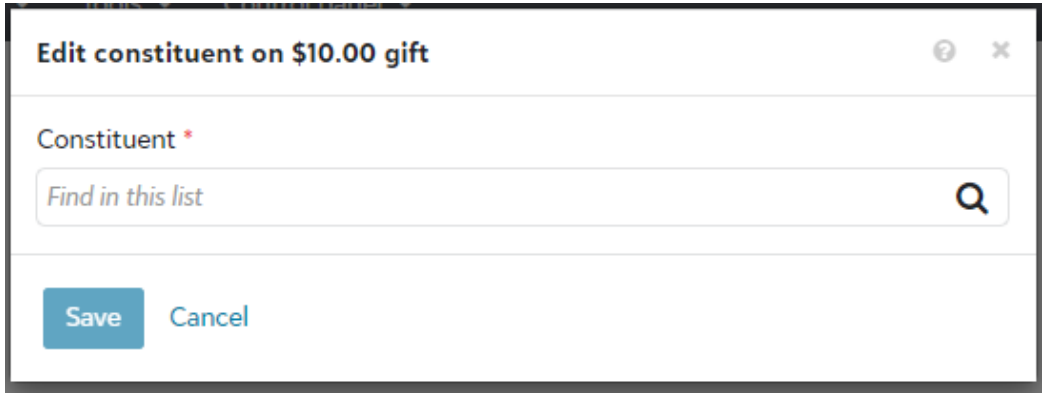
Scheduling: Be aware that once you've added an email to receive a dashboard, the list is out of your control. A recipient has to unsubscribe to stop receiving the email

# EXPERIENCE THE AWESOMENESS!!!

# Easily move a gift from one constituent record to another

Life happens, and gifts occasionally are entered on the wrong “John Smith” constituent record. Gifts can be moved to the correct constituent with no loss of gift history.



# PREPARE FOR THE AWESOMENESS!!!

# Things to think about with moving a gift WORD:SECURTIY!

**oh, and GL Post status for those of you integrated with FE*

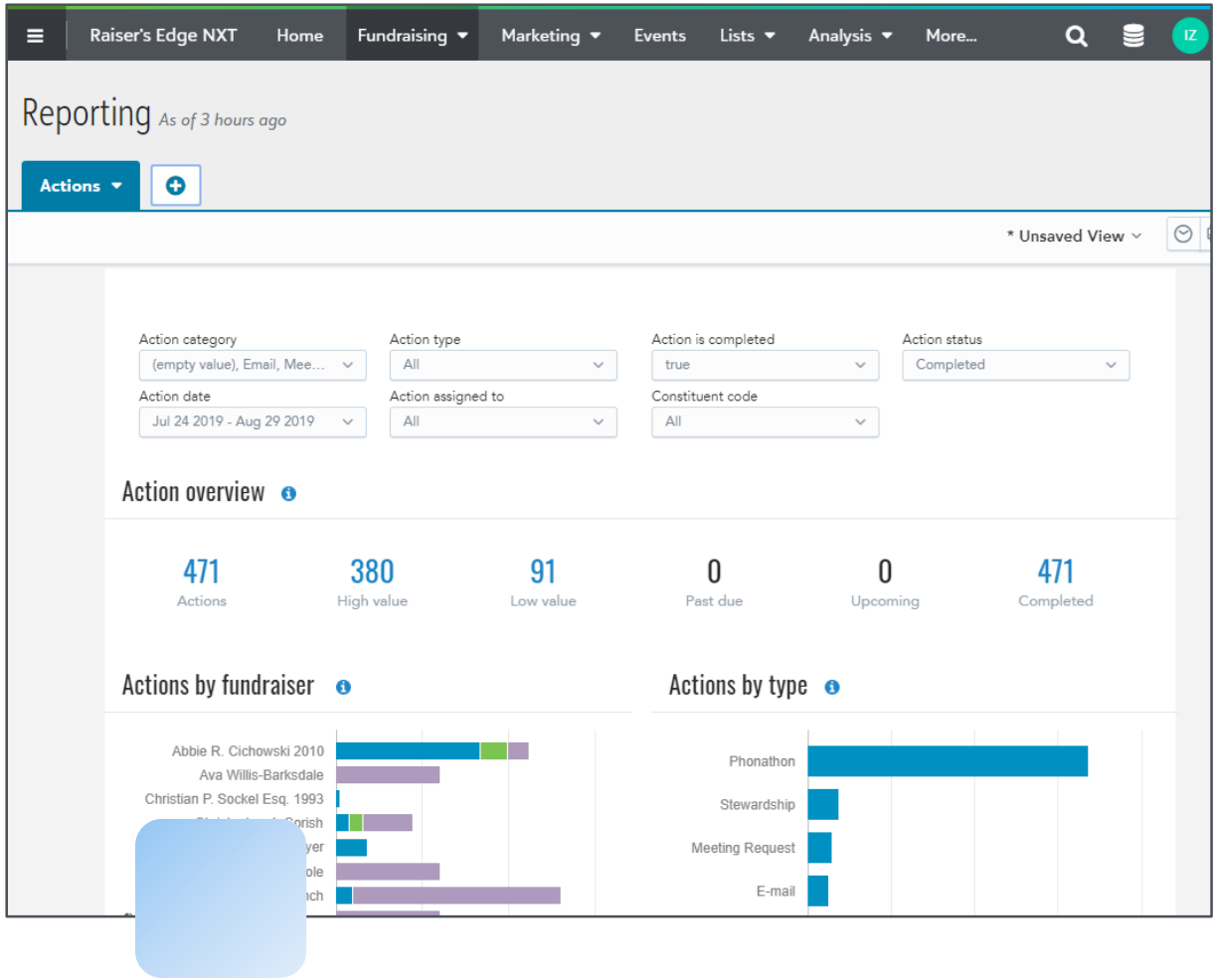
# EXPERIENCE THE AWESOMENESS!!!

# EXECUTIVE MANAGEMENT DASHBOARDS

- Retention
- Acquisition
- Recapture

- Opportunity lists!!!!
  - With NEXT ACTION!!!
- Actions by Fundraiser
- High value actions only (Meetings, Phone calls)

# Using prebuilt dashboards - actions




- Instead of running several reports filtered by fundraiser in database view, put that information at everyone's fingertips

# PREPARE FOR THE AWESOMENESS!!!

# Things to think about

- Overall health of existing Action records
  - Completed status
  - Fundraisers assigned appropriately
- Completeness of existing Opportunity (Proposal) records
  - Status
  - Fundraisers assigned appropriately
  - Dates
    - Asked
    - Expected
    - Funded

Questions?

Other great ideas of how Raiser's Edge NXT works for database administrators?

# LET'S CONNECT

https://www.facebook.com/groups/REUserGroup/?fref=nf

# INSPIRED?
# WIRED?
# FIRED UP?

Tell us in a session survey on the mobile app, and you'll be entered to win a complimentary pass to bbcon 2020 in Seattle, WA!

# THANK YOU!

bbcon® 2019