

Growing Your Organisation

The Raiser's Edge® Training



Blackbaud Training

Discover how to make The Raiser's Edge work for your organisation with *The Raiser's Edge: Growing Your Organisation*. This two-day course is designed to help nonprofit executives, board leaders, and fundraising managers take full advantage of their investment in The Raiser's Edge. Participants will learn how The Raiser's Edge supports donor cultivation, relationship management, and fundraising activities.

Course Objectives

Upon completion of this course, participants will be able to:

- Navigate in The Raiser's Edge
- Locate constituent information in The Raiser's Edge
- Build constituent relationships and manage donor cultivation with The Raiser's Edge
- Manage fundraising activities in The Raiser's Edge
- Streamline navigation in The Raiser's Edge by customising dashboards and the home page

Prerequisites and Advanced Preparation

This course is designed for nonprofit executives and fundraising managers who are responsible for cultivating donors and managing fundraising activities. Users with little to no experience will benefit from this course. Before attending this class, participants should be comfortable working in a Microsoft® Windows® environment.

Course Content

Navigation

- Log in to and out of The Raiser's Edge
- Navigate to key functional areas in The Raiser's Edge
- Locate Blackbaud Help resources in The Raiser's Edge and online

Finding Constituent Information

- Describe how data is organised in The Raiser's Edge
- Describe how records are connected in The Raiser's Edge
- Find key information in The Raiser's Edge to track constituent activity
- Customise the Constituent Profile report
- Create a custom view for constituent information

Building Relationships with Action Tracks

- Use action records to track interaction with constituents
- Enter and update action records for constituents
- Create and assign action tracks to support moves management and build relationships with constituents

Managing Fundraising Activities

- Plan a fund structure for managing gifts
- Plan a campaign structure that includes appeals and packages
- Create fund, campaign, appeal, and package records to support fundraising plans
- Enter fund, campaign, appeal, and package information on a gift record
- Create profile and summary reports to measure the effectiveness of fundraising activities

Customising Dashboards and the Home Page

- Describe the role of dashboards and the home page in The Raiser's Edge
- Navigate the Dashboard page
- Create and update dashboards
- Add shortcuts and other resources to the home page

► To learn more about Blackbaud training for The Raiser's Edge®, contact your account representative.