

# Solution Overview

For higher education institutions



## Blackbaud CRM — Bringing industry-leading advancement solutions to constituent relationship management

### Solving the challenges of higher education institutions

Beyond the traditional challenges faced by educational organizations — such as building relationships with constituents, raising money, and increasing stewardship — large higher education institutions face even greater challenges with inconsistency in brand and constituent experiences, organizational inefficiencies, and schools or programs that are not properly enabled for success.

To meet these challenges, large institutions need flexible, scalable, and secure constituent relationship management (CRM) solutions that address their unique needs. Only Blackbaud CRM combines Blackbaud's depth of experience in higher education with true enterprise CRM solutions, allowing institutions to engage their supporters and alumni by building deeper and more personalized relationships. It also helps them achieve organizational efficiency, and it enables the success of individual schools and programs.

Blackbaud CRM brings together disparate information — such as annual and capital giving, gift planning, major giving, corporate and foundation relations, and alumni and parent systems — across the various schools and programs within a university. With a single system of record that can be securely and efficiently shared, universities are able to turn their data into timely, actionable information that maximizes their advancement efforts, synchronizes campaigns across schools and programs, and strengthens relationships with alumni and other constituents.

## Introducing Blackbaud CRM — The only CRM solution built specifically for higher education institutions

By integrating our deep knowledge of advancement into Blackbaud CRM, Blackbaud offers the only organization-wide solution that helps universities efficiently manage traditional CRM responsibilities as well as the unique needs and responsibilities inherent in the higher education space.

Continued

## The Overall Value of Blackbaud CRM

### **Provide true constituent relationship management across your entire institution.**

- Obtain a complete view of constituent and alumni activity and engagement across the institution, allowing for deeper relationships and more relevant and targeted communications
- 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.
- Move alumni, prospects, corporations, and constituents across giving and engagement levels more efficiently and effectively.
- Enable users with a tool that will be tailored to their user experience and role, increasing the level of user adoption and consistency.
- Standardize best practices across the organization, in turn eliminating redundant processes, data, and costs.
- Gain significant cost and organizational efficiencies through better utilization of your existing technology and infrastructure.

### **Enable the individual success of schools and departments within your overall institutions.**

- Provide strategic services and direction across schools and departments.
- Provide school/department/program-relevant tools and best practices.
- Consolidate overhead to free up organizational areas to focus on their strategic missions.

## Blackbaud CRM — Across functional areas

### **Major giving and advancement:**

- Track multi-dimensional relationships with students, alumni, parents, board members, and others across disparate schools, departments, and programs.
- Oversee your donor cultivation, life cycle management, and donor stewardship services processes
- Manage robust household and group giving by creating plans and tracking actions for groups of constituents, including families, foundations, corporations, and key individuals.
- Use automated business rules to determine constituencies and fully understand those relationships with your organization.
- Easily manage complex and multiple giving vehicles through customized workflows based on gift vehicle or pledge amount.
- Manage fundraising teams and groups to gain insight into metrics about the moves management process, opportunities, and prospect trends.

Continued

- Manage alumni membership and community support.
- Enable donor services and stewardship through the use of stewardship plans to track acknowledgements, recurring actions, benefits, and giving program management.

**Multichannel communications and marketing:**

- Full multichannel marketing campaign lifecycle support.
- Budgeting and planning to foster communications collaboration and coordination across schools, departments, and programs.
- Analysis and sophisticated segmentation tools.
- Campaign execution through traditional direct mail or online communications sent from Blackbaud CRM.
- Measurement and reporting to inform the institution about the results and success analysis metrics of campaigns.
- Increase annual fund participation with complete annual fund giving campaign support — from identification through segmentation and messaging.

**Program areas and mission enablement:**

- Use advanced endowment management features that empower you to communicate investment performance, revenues, and expenses on individual endowments.
- Communicate endowed scholarship performance, including earnings and distributions.
- 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 additional functionality on top of the platform to complete the 360-degree view of the constituent, bringing your institution closer to its constituents.

**Core and operational:**

- Support multiple schools, departments, and program areas.
- Easy-to-use, role-based interface which reduces training needs by tailoring the user experience based on your institution's unique business rules and processes.
- Use organizational reporting and data analyses with key fundraising metrics, such as helping to manage individual and team fundraising performance using
- Get strong reporting and analysis tools, including ad-hoc reporting, key performance indicators (KPIs), and web dashboards.
- Use customizable courseware and online help tailored to your institution's unique business processes and workflow.

Continued



Create a 360-degree view of the constituent across your organization

## Blackbaud Infinity™

Blackbaud Infinity provides higher education institutions a state-of-the-art technology platform that enables them to improve their relationships with constituents, boost efficiency, and raise more mission-critical funds. Hallmarks of the Blackbaud Infinity platform include flexibility, scalability, and new levels in IT security within a solution that can accept customizations and has a real upgrade path.

### Flexibility:

- Implement your institution's business rules to enforce standardized policies and procedures.
- Use Blackbaud's Software Development Kit (SDK) to extend the solution to meet your institution's specific and unique needs.

### Scalability:

- The world-class enterprise platform is designed for speed and scale.

### Security:

- Robust security allows every function in the system to be secured by role and by department, providing assurance that your data is protected.
- Create a 360-degree view of the constituent across your organization.

### Departmental and functional control:

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

### International support:

Continued

- Get foreign language and multi-currency support.

**Web delivered:**

- Get a 100% Web-deployed application, decreasing demands for IT support (there is no need to install or update machines the traditional way).
- Expand your reach to your entire organization (multiple schools, remote advancement officers working from home, etc.).

**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 higher education institutions and their alumni and supporters like Blackbaud. Our solution provides a true enterprise advancement system that incorporates best practices in advancement and can be further tailored to meet the specific business processes and procedures of your college or university. It can help your institution manage alumni and other constituent relationships efficiently while maximizing the value and impact of those relationships.

By partnering with Blackbaud, your institution will enter into a long-term relationship with a market leader that has 30 years of experience in the higher education space and can help maximize the value of your constituents.

► To learn more about Blackbaud CRM™, visit <http://www.blackbaud.com/enterpriseCRM> or contact your Blackbaud account representative.