CRM Basic Navigation Training

High-Level Outline for Blended Learning.

Anne De Felice, Items highlighted are notes from meeting .

Welcome	eLearning	In-Pe-son	Knowledge Description
	✓		CRM is the "database of record," the repository of donor information, containing everything from basic contact info, relationships, employment, networks, research data, giving history, gift agreements, consent forms for image/story use, significant interactions with staff.
	✓		CRM is used by nearly every department in the Organization, often in very specialized ways
	✓		CRM is dynamic – it is updated daily by Organization staff in a variety of roles. Data also comes in through our online giving portal (Luminate Online), which is where some dupes can come in
	✓		Data quality/ integrity is critical and you have a role to play – garbage in, garbage out. We have a records integrity team, but it is easier to prevent errors than to catch them after.
	✓		Confidentiality is critical – HIPAA and PCI – both of info within the database, and how you can access it
	✓	✓	CRM is incredibly robust – do not reinvent the wheel with your own short cuts. If you don't know, ask.
		✓	What you can and cannot edit in CRM – using tellcrm email for edits
	✓		CRM views are customizable / as you learn the system more and are working in specific areas frequently, it saves time to add links and rearrange views
		✓	Difference between an export, a report, and a query
		?	What is a workspace and how do different depts. use them – Consider for certain groups like LG, others?
✓	✓		CRM is web-based – what does this mean in terms of access (Internet Explorer or Chrome will work with slight variations in performance)
	✓	✓	Papersave is a way to attached scanned paperwork to a record, like a Gift Agreement with terms, acknowledgement, correspondence. Papersave is glitchy.
	?	✓	Prospect & Revenue tabs

eLearning Performance Objectives

- Describe the CRM, its importance and the user's responsibilities (based on the Knowledge items)
- Able to log in to CRM
- Able to customize homescreen, left nav, rearrange tabs in Constituent
- Able to read and understand Constituent Record
- Able search effectively and to pick out the right record from search results.
- Able to spot a dupe or problem record and know what to do with it (email tellcrm)
- Able to run some common report TBD and export
- HIPAA & Donor Confidentiality is of utmost importance. Able to explain that.

High-Level Outline and Treatment

Section	**Possible Treatment**
Glossary	Do you want to include a Glossary with common terminology? This would be available throughout the eLearning. Note: Anne will jot down terms that are new/confusing.
A. Introduction • CRM is the "database of record," the repository of donor information, containing everything from basic contact info, relationships, employment, networks, research data, giving history, gift agreements, consent forms for image/story use, significant interactions with staff. • CRM is used by nearly every department in the Organization, often in very specialized ways • CRM is dynamic – it is updated daily by Organization staff in a variety of roles. Data also comes in through our online giving portal (Luminate Online), which is where some dupes can come in • Confidentiality is critical – HIPAA and PCI – both of info within the database, and how you can access it • CRM is incredibly robust – do not reinvent the wheel with your own short cuts. If you don't know, ask. • What is a workspace and how do different depts. use them – may not need to cover this in the basic training? *(may not include in eLearning?)*	A few screens to Introduce the CRM. Narration will be used describe each item along with with accompanying on-screen text bullets and possibly diagrams where applicable. *Note: These Introduction items are based on the Knowledge Items listed previously in this document. Additional knowledge items will be put into relevant sections of the eLearning so they are in context for the learner. See below*
B. How to log in • Knowledge: CRM is web-based – what does this mean in terms of access (Internet Explorer or Chrome will work with slight variations in performance)	Software demo Access from anywhere

C. Home screen tour plus shortcuts and left nav • Home, Constituent, Reports, PaperSave (there are other functional areas, but these are the ones to focus on in the basic training) • Left nav - Shortcuts (managing/ cap @ 10), Recent Searches, Recently accessed • Customizable • How to access the Organizational Calendar, and what kind of events are on it, how is it populated Home Screen tour. When person is given account in CRM	Software demo highlighting areas. Refer them to the Job Aid "CRM Cheat Sheet/Navigation Tips" for more details. Also make it available in eLearning from the Resource menu. *Question:* *Can also make available in the CRM? LMS? CRM has its own help feature it is not customized.*

D. How to read a constituent record, what can you glean Constituent definition—add here i. Explain pop up notifications ii. Constituency Codes iii. Constituent Summary Tiles iv. Customizing tiles *[Ask Andrew or James—depending on level of access different things are displayed.]* *what to demonstrate that applies to most* v. Minimizing Tiles vi. Constituent tabs – Will be covered in in-person follow up • Knowledge: CRM views are customizable / as you learn the system more and are working in specific areas frequently, it saves time to add links and rearrange views • Knowledge: What you can and cannot edit in CRM – using tellcrm email for edits • Knowledge: Data quality/ integrity is critical and you have a role to play – garbage in, garbage out. We have a records integrity team, but it is easier to prevent errors than to catch them after. Good example/Bad example. Maybe is not as relevant. • Knowledge: Difference between an export, a report, and a query [Where data comes from. What data to focus on when you are doing data entry.] Elements of a record go into the report. Sometimes there is a disconnect with where information comes from. Makes more sense in context of Prospecting vs Constituent. Error messages—basic record creation. New users will hit these errors and won't know how to proceed. After they go through Andrew's training then they do records creation. Use "Dummy" records	Short software demo Refer them to the Job Aid "CRM Cheat Sheet/Constituents" for more details. *Question-what record to use?* *Note: To engage learner, I have them view a Constituent record first, and then do a search for another Constituent after this.*

E. How to Search for a constituent – common searching aids, like wildcards • ~~Constituent definition~~ (moved up to previous section) • Search abilities i. Explain searching 1. Quick Search ("FName Lname" or "Lname, Fname" or Donor ID) 2. Constituent Search Do they need both? YES iii. Recent searches retains parameters ii. Explain why we recommend primary address is left unchecked iii. Multiple address; phone; or emails iv. Point out match IDs v. Point out Primary Manager search options vi. Point out Primary manager in results grid Is this too early? If you are supporting a manager it applies. Talk about dupes in this context, for example, “By the way, you’ll notice in this example there are duplicates. How do you find the right record?” Hopefully people will know their scope includes trying to track things down for an officer. Some new staff are brand new to Development, they won’t understand the terminology. Help someone identify how to filter to find the right record. vii. Briefly touch on other record types - Group, Household viii. Finding the right record out of a group of what appear to be dupes – how to spot a real dupe. See who is assigned to Prospect. ix. What to do if you find a dupe	Demo (Include both Quick Search and then Constituent search?) Yes Include scenario—pre stage in terms of responsibilities. Need help from the people for specific examples. Knowledge Check – either Questions or Simulation.

F. What is Papersave? • Knowledge: Papersave is a way to attached scanned paperwork to a record, like a Gift Agreement with terms, acknowledgement, correspondence. Papersave is glitchy.	Very Short description and screen shot (no demo) If you don't have access – if you can't see it, do this.

G. Reports Define Reports i. Review ONE report (which one TBD) Two. Data List and Standard ii. Ctrl+F on Reports page to easily find report iii. Adding shortcuts to side bar Customize Home page--either on the side bar or in Functional Area—to cut through the "Report clutter" Frequent reports. Find a couple of favorites you want to put on your home page. For example, revenue etc. iv. Run a reports (which one tbd) as an example 1. explain parameters 2. running report 3. exporting data 4. Jira-using to request a new report v. Follow up will include more specific reports based on your role • Knowledge: What is a report? • Knowledge: Difference between an export, a report, and a query [Not sure if we get into the queries.] NO need to cover query • Knowledge: What you can and cannot edit in CRM – using tellcrm email for edits. Report is static – moment in time.	Demo Knowledge Check – either Questions or Simulation. *Questions:* *What Report will be reviewed/run?* *Will learner need to be shown how to navigate to Reports page*? Which Report Using Jira to request a new report. Two styles Data list Standard Workhorse Reports

H. Conclusion and Next Steps	TBD What will be in this section *Questions:* *Does learner get feedback immediately after doing practice assignment, or do they get feedback later in the follow-up in-person training? (How ill they know if they have done assignment correctly?)* *Different assignments for different roles – For example, for a Staff Assistant, what is most common report they need to run?? Will they practice this before they meet for follow-up in-person training?*