Draft Storyboard

CRM Basic Navigation Training

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eLearning Performance Objectives

Below are the performance objectives for the eLearning. Note that I have also included these objectives in the relevant sections of the eLearning.

- Describe the CRM, its importance and the user's responsibilities (based on the Knowledge items)
- Able to log in to CRM
- Able to customize home screen, left navigation, 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.

Storyboards, by Section

Note that, in addition to the slides listed in the storyboards, each section will also have an "Introduction" slide as well as a "What's Next Slide" which describes the upcoming section. Also, note that the storyboards for the demonstrations (four total) are in separate documents.

See below for:

Section 1: About The CRM
Section 2: Home Screen Tour
Section 3: How to Search for a Constituent
Section 4: How to Read a Constituent Record
Section 5: Opening and Running Reports
Section 6: Conclusion and Next Steps

Welcome Section

Slide name	Narration/Screen Text	Graphic and Interaction
Title Screen	Narration: Welcome to CRM Basic Navigation Training.	Intro/ Title screen
Navigation	Narration: Here are some tips on navigating the course.	Captions pointing to navigation features in Player
Course Contents	This course provides an introduction to basic CRM functionality. Topics include: • An introduction to CRM • A tour of the home page • The basics of conducting record searches • How to understand constituent records • How to open and run reports Additionally, this course provides to user guides and reference materials.	
What's Next	In the next section, you'll learn some background about CRM.	What's Next graphic

Section 1: About The CRM

Performance Objective from Outline:

- Describe the CRM, its importance and the user's responsibilities (based on the Knowledge items)
- HIPAA & Donor Confidentiality is of utmost importance. Able to explain that.

Storyboard

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
	Training Objectives	In this training, you'll learn the basics of CRM, including a tour of the home page, conducting record searches, understanding constituent records, and how to run reports	CRM Training Objectives • About CRM • Login and Home Page • How to Search • Understanding Constituents • Reports	
J.	About CRM	Let's start with some background about CRM CRM stands for Constituent Relationship Management. It is the Organization's database. Click on each tab below to learn about more about CRM.	Slide with information on multiple clickable tabs. What is CRM? • CRM is short for Constituent Relationship Management. Its purpose is to manage the relationships and interactions between this Organization and the individuals and organizations that support our mission and fundraising efforts. CRM provides many features to help you navigate, access, and share information about our constituents. What is stored in CRM? • CRM is the Organization's "database of record." It is the single repository of constituent information, containing everything from basic contact info, relationships, employment, networks, research data, giving history, gift agreements, consent forms for image/story use, event attendance, cultivation strategies, and significant interactions with staff.	

Who uses CRM?

- CRM is used by nearly every department in the Organization, often in very specialized ways. For example:
  - Frontline fundraisers log interactions and plan steps as they cultivate prospective donors and steward current donors.
  - Finance and Gift Services staff securely store gift agreements and share details on giving history.
  - Foundations staff manage grant proposals.
  - Prospect Research staff communicate research data.
  - Events staff track participation.

In other words, CRM is integral to most of our work, so take the time to learn it well. Do not reinvent the wheel by creating "shadow systems" to do your own work.

Where does CRM data come from?

- CRM is dynamic and robust—it is updated daily by Organization staff in a variety of roles. CRM also includes information provided by constituents through our online giving platform, called *Luminate Online*, which is imported and synced in a nightly download. You will be able to make edits in CRM; editing rights vary based on role. You have an important role to play in making sure CRM is accurate, consistent and complete.

How secure is CRM?

- CRM is very secure—it's what we do with the data that can compromise security. You play a critical role in maintaining security and confidentiality of the data stored in CRM.
  - CRM is only accessible inside the firewall. You can access CRM from a work computer, or by using VPN if working remotely.
  - CRM contains both HIPAA and PCI protected information. Be sure to watch the HIPAA MYRs in NetLearning, read the HIPAA materials in your new hire binder, and attend the

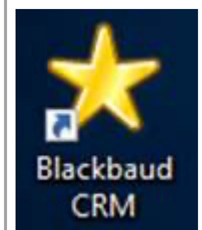
			Organization's HIPAA & PCI Orientation within your first six weeks. • Use CRM solely for work purposes, only access the data you need to do your work, and do not remove or store constituent data outside CRM.	

Section 2: Home Screen Tour

Performance Objective from Outline:

- Able to log in to CRM
- Able to customize home screen, left navigation, rearrange tabs in Constituent

Storyboard

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
J.	Introduction to Logging in and the Home Page		Slide with Text and screen shots To get started, look for the Blackbaud CRM shortcut icon on your desktop. This was installed and configured during your IT overview on your first day. To access CRM, double click the icon. You should be logged in to CRM with a view of the home screen. Note that you will be logged into CRM using your default preferred browser. CRM works well in any browser, but Internet Explorer is preferred for using PaperSave (the tool used to access to documents associated with records in CRM). CRM is only accessible inside the firewall. You can access CRM from a work computer, or by using VPN if working remotely. If you don't see the icon or you are not logged in, email	

J.	Home Page		Screen shot of home page. Let's check out the main features of the home page: • Home Screen • Left Navigation • Functional Areas *Please refer to the Job Aid "CRM Cheat Sheet/Navigation Tips" for more details. You can find the job aid in this eLearning from the Resource menu.* Next, we'll watch a short demonstration of navigating the CRM home page.	Call out in screen shot: • Home screen • Left Navigation • Functional Area • Is PDF of Cheat Sheet finalized or does it need updates? Cheat sheet needs updates
James	Demo: Home Screen Tour		Note: see storyboard on the tab Demo - How to Search for a Constituent click here to go there directly Demo - Home Screen Tour [NOTE: link not active in this example]	
	What's next		Screen shot of home page. You've seen a quick tour of the home screen. What's next In the next section, we will explore some of the functional area tabs in more detail, focusing on the ones that all Organization staff use: • Constituent and searching for constituents • Reports • PaperSave	Callout in screen shot highlighting functional area and the three tabs below Or, the What's next graphic with the next section highlighted

			The other tabs in the functional areas are useful for specific jobs at the Organization. Depending on your job, you'll get more information on additional tabs in future trainings.	
	Quiz		can we have some little quiz or questions throughout?? Yes we can have some questions throughout- (here are some ideas--these would be either multiple choice or a screen shot with hot spots the learner can click) • What are the areas of the Home page you can use to Navigate? • What is the difference between the Navigation Bar and the items in the center of the Home Page (I'm still not entirely clear on this one myself) • Where is the Calendar? • How do you customize the Left Nav Shortcuts? • How do you customize the Home Page? (Functional Areas) The three in green seem to relate most to the content we've covered. If we need to choose one how about customizing the home screen	

Section 3: How to Search for a Constituent

Performance Objective from Outline:

- 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)

Storyboard

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
J.	Introduction to Searching	In this section we'll introduce searching in CRM	Slide with Text and screen shots **Introduction to Searching** To find a record in CRM, you use the Search feature. In this section, we'll provide an intro to this feature. After you complete this eLearning, we'll provide you with some targeted exercises based on your role to practice searching on your own in CRM.	
	What is a Constituent?	There are thousands of constituent records in CRM. Getting good at searching is key.	Slide with Text and screen shots Constituents are the individuals and organizations who support the Hospital's mission and our fundraising efforts. Constituents can be individual donors, households, board members, doctors, volunteers, corporations, businesses, foundations, or event attendees. Even staff have constituent records in CRM. Finding the right search result can be tricky, because sometimes the same record may appear multiple times, with small variations.	

			Next, we'll watch a demonstration of the different methods you can use to search for constituents. It's a lot to remember, so you can also use your Cheat Sheat on Search methods when you are ready to search on your own. To get a copy of the cheat sheet, go to the Resources menu on the top right. (Is there a Cheat Sheet on searching?) - yes, there is one! I never saw it before. Looks like an unfinished draft - I will save the job aids we may want to use/update to the reference materials tab	
J.	Demo1 Quick Search		Note: I think maybe this should be three separate demos. I've divided it up this way so you can take a look. I have put in hyperlinks between this tab and the demo tab. Click here to go to first demo directly Demo 1: Topic-Quick Search [NOTE: link not active in this example]	
	Intro to Constituent Search	Now that you've seen a Quick Search, we'll look at doing a Constituent Search. We'll also explore the Advanced Search Options. Use a constituent search if you	**Constituent Search** Use this search if you have information in addition to the name to help narrow your search (such as email address or business address). You can get to the Constituent search from several locations. Any link to Constituent Search brings you to the same place. For example: • Constituent Search on home screen of Constituents functional area	

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<tr>
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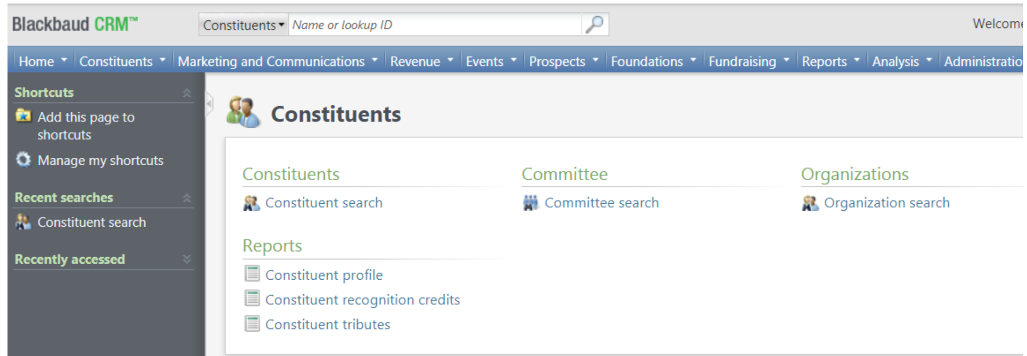
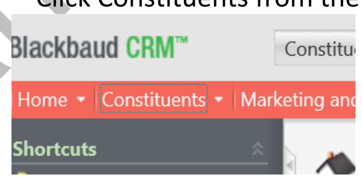
<td>have information in addition to the name to help narrow your search (such as email address or business address).

There are several ways to start a Constituent Search, outlined here.</td>
<td>

-
- Click the drop-down menu next to the Constituent tab and select Constituent search

-
- Click Constituents from the top bar



and select Constituent Search from the Constituent's page</td>
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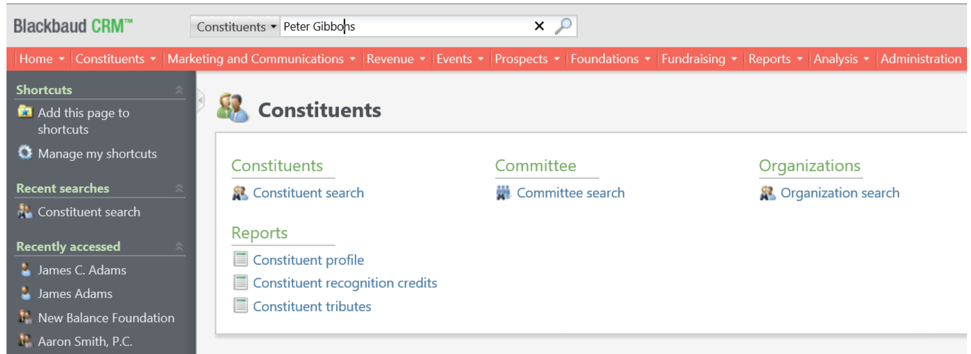
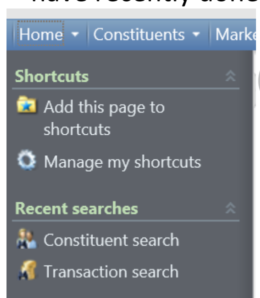


Constituent Search in Left Nav under Recent Searches. (this will only appear if you have recently done this type of search)



Next, let's look at a demonstration using Constituent Search. We'll also explore some of the Advanced Search options and how they can affect your results.
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<td>Demo 2 Constituent Search</td>
<td></td>
<td>Click here to go to second demo directly
Demo 2: Constituent Search/Primary Address checked (Advanced
[NOTE: link not active in this example]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>About Duplicate Records</td>
<td></td>
<td>Another situation you may encounter while searching is you may come across duplicate records. The next demonstration will show you how to detect duplicate records, and what to do if you think you've found one.</td>
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	Demo 3 Duplicate Records		Click here to go to third demo directly Demo 3: Topic: How to Spot a duplicate record. [NOTE: link not active in this example]	
	Recap		To recap here's what we have covered • Quick Search • Constituent Search • Advanced Search Options • Duplicate Records For more help on Searching, you can also refer to the Cheat sheet on searching. (Is there a Cheat Sheet on searching?) - yes, there is one! I never saw it before. Looks like an unfinished draft - I will save the job aids we may want to use/update to the reference materials tab	
	Quiz		This will be a simulation. Click here to go to simulation directly Topic: Searching Simulation [NOTE: link not active in this example]	
	What's next?		You've seen examples of searching for constituents. Now, let's look more closely at one constituent, to understand how to read a record.	What's next graphic with the next section highlighted

Section 4: How to Read a Constituent Record

Performance Objective from Outline:

- Able to read and understand Constituent Record

Storyboard

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
J.	Introduction to Records	Each record in CRM contains detailed information about the constituent	Text and a screen shot **Introduction to Constituent Records** There is a wealth of information in each constituent record. The top of the Constituent Record gives a snapshot of frequently used summary tiles. You can customize these summary tiles using the customize tiles button. [highlight button] Pick the tiles most important to you, and remove the ones that don't apply. Beneath the summary tiles, the tabs on the constituent page allow you to navigate to different information relating to this constituent. The most commonly used tabs are: • Summary: Recent and upcoming activities such as events, and recent and upcoming communications, including direct mail, event invitations and acknowledgements. • Personal: Personal details such as marital status, birth date, interests, recognition preferences, and wealth rating • Contact: Mail, phone, email, and social media details • Revenue: Donation information such as giving summary, giving history, tributes and recognition details • Relationships Tab: Family, social, and professional associations	Screenshot of 174921 bulleted list of the types of inmfo?

<table>
<tr><td></td><td></td><td></td><td>Documentation and Interactions Tab: Notes about planned and completed interactions between the constituent and Organization fundraisers
Papersave: Scanned documentation such as gift agreements and consent forms associated with the record
Refer to the Job Aid “CRM Cheat Sheet/Constituent Page” and glossary for more details. Also make it available in eLearning from the Resource menu.</td><td></td></tr>
<tr><td>James</td><td>Examples of Constituent Records</td><td></td><td>Screen shots of a few records—maybe by clicking a link to pop up each record or a table like below?

There are four types of constituent records. [use 174921 in staging - not list below]
Note how the icon looks different in each example below: [

<table><tr><td>Individual</td><td></td></tr><tr><td>Household</td><td></td></tr><tr><td>Organization</td><td></td></tr><tr><td>Group/Committee</td><td></td></tr></table>Of these four the two we use the most are Individual and Organization.

Let's look more closely at a constituent record.</td><td></td></tr>
<tr><td></td><td></td><td>2 main types of records with deal with</td><td>Here is a constituent record for an organization.</td><td></td></tr>
</table>

		Individuals & Organizations: header icons are different Tab labels/names reflect the record (i.e. Personal Info vs. Organization Info)	And here is a constituent record for an individual:	
		Top of the page: Name, ID, Constituency codes*	At the top of the record, you will see the record type (individual or organization), the Lookup ID, and a number of Constituent Codes. Note about Constituency codes: These codes tells you some of the main descriptors or characteristics of the constituent. Some are hyperlinks to other areas of the constituent's record. Depending on your role, you will receive additional information on these codes in your follow-up training.	
			Next, we'll watch a short demonstration of reading a constituent record.	
James	Demo		Note: see storyboard on separate tab: Demo - How to Read a Constituent Record [NOTE: link not active in this example]	

	Quiz		Regarding a Quiz, what are the most important points to quiz them on? • 2 main types of records with deal with Individuals & Organizations • Top of the page: Name, ID, Constituency codes* • Papersave • What else?	

Section 5: Opening and Running Reports

Performance Objective from Outline:

- Able to run some common report TBD and export

Storyboard

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
J.	Introduction to Reports		Slide with Text A report consolidates information stored in CRM and displays it in a consistent format. It is a convenient way to view, format, summarize, and analyze the information stored in CRM. * CRM is updated constantly, but once a report is run, the output is static. Note that reports are run from a back up of CRM which updates nightly. It will take a day before information you input into CRM shows up on a report. Reports are designed so that users can easily select specific parameters or filters to pull tailored data from CRM. In other words, each report begins with some questions you need to answer in order for the report to pull the correct information from CRM. All the data in reports comes from CRM. If a report doesn't look right, it is more likely that there is a problem with the data was entered, not the report. New reports are created when needed by the Organization's	

			IT Reporting team. This team can also help if your reports aren't pulling correctly. The Organization uses dozens of reports, and each was created for a specific analytic purpose. But, most people use just a few reports. Let's take a look at the Reports tab in the Functional Area. This is a lot of text. Advice on how to do this? *Some of this can become part of the demo. The parameters you choose changes results. The shell exists, you populate it with the right information.* *James--can put data in* *Angela's team--they can finroatmion out. On a report.* *Management of *see above*	
	Shortcuts for Frequently Used Reports	The reports on the top left are like the "greatest hits" list of frequently used reports The best way to get to know Reports is to run them.	Slide with Text and screen shots The Report tab in the Functional Area brings you to the Report area with all the Organization's reports. Look for a list of Frequently Used Reports in the top left. On your own, it is good to experiment with various reports, starting with the Frequently Used Reports. Observe how the results change when you alter the parameters and filters. But keep in mind that CRM contains HIPAA and PCI information, so do not run reports unless you have a purpose. Learning is a legitimate purpose! **If your purpose is to learn, it's okay to run reports just don't download or print them.**	Screenshot of report home screen Highlight top 11 section

J.	Customization on Home Page		Slide with Text and screen shots Most likely, there are just a few reports that you will use day to day. These will be identified by your manager and in further training. Once you learn them, you can add links to these reports to your left navigation shortcuts. You can also customize your Home screen to link directly to frequently used reports. Earlier, you saw a demonstration about customizing the home page: • First, click the Customize link next to the Home icon. • Next select Reports from the Functional area in the left column • Then select the checkbox of the report you want on your home page from the task frame do we want to show this again? Let's look more closely at how to open and run reports	screenshot highlighting a report link in the left nav Screenshot of the customize pop up window with Report selected in the functional area and a top 12 report selected in the task frame
James	Demo		Note: see storyboard on separate tab: Demo - Opening and Running Reports [NOTE: link not active in this example]	
	Quiz		How to quiz them on this section? (not sure what is needed here) What is a report? How to find the report you need?	

Section 6: Conclusion and Next Steps

Who will write first draft?	**Slide name**	**Narration**	**Slide Treatment/Text On Screen**	**Graphic and Interaction**
J.	What's Next	Congratulations, you've completed the Basic Navigation eLearning. In the next few days you will receive an email with an assignment which you must complete before your next in-person CRM Basic Training. The assignment will be tailored to your role.	Slide with Text You've completed the Basic Navigation eLearning. Next you will take an in-person CRM Basic Training to build on the concepts you learned today. You will receive an email with an assignment to complete before your in-person training. Depending on your role, in the coming weeks you will also be invited to additional CRM trainings on specific areas of CRM such as Gift Navigation, Prospect Management, or Event Management. Look for an email with further instructions. .	
			Need Help? Please refer to the Job Aids for details on the information covered in this eLearning. You can find the job aid in this eLearning from the Resource menu. Visit the Organization intranet for this and other CRM job aids. You can also try the Help tab located on every screen in CRM.	

			 When you click the Help icon a panel appears from the right side of your screen and can be detached for easy viewing. Note that the Help feature opens generic Blackbaud Help topics so the assistance is not tailored to how the Organization uses CRM. And, if you have any questions or need help before your next training, please email	