Welcome to the future of CRM.

Roadmap Preview ➤

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Today's Agenda

- Meet the BBCRM Leadership Team
- 2015 Roadmap
- A closer look at version 4.0 Service Packs 1 and 2
- 2015 Initiatives
- Communication milestones
- Feedback and resources

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Meet the BBCRM Leadership Team

Bill Walsh
Director, Product
Management

Trit Mulligan
Programs
Higher Ed/Hospitals

Sam McGuin
Internet and Email

Alison Madrigal
Product Marketing

Dan Bowman
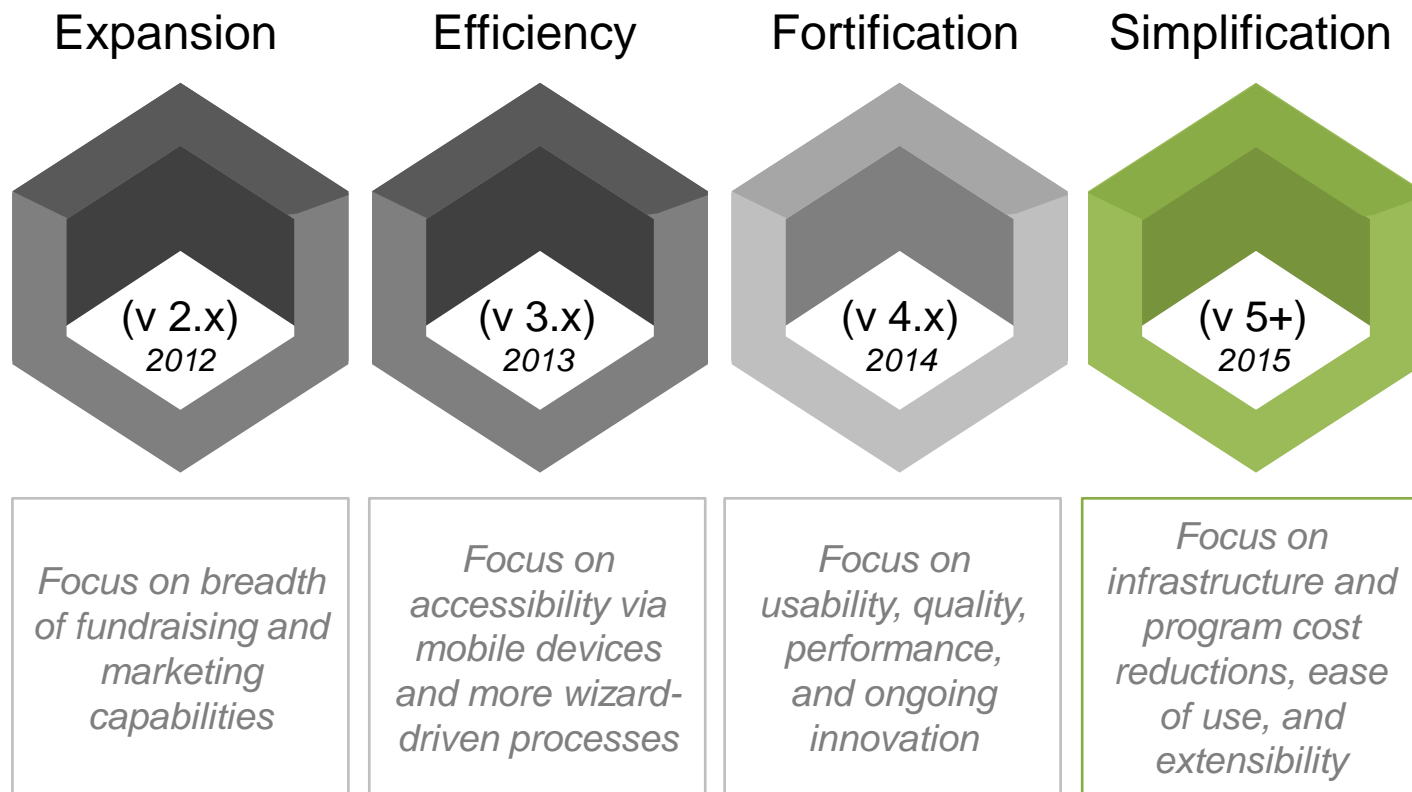Money
Platform

Matt Crawford
People
Performance

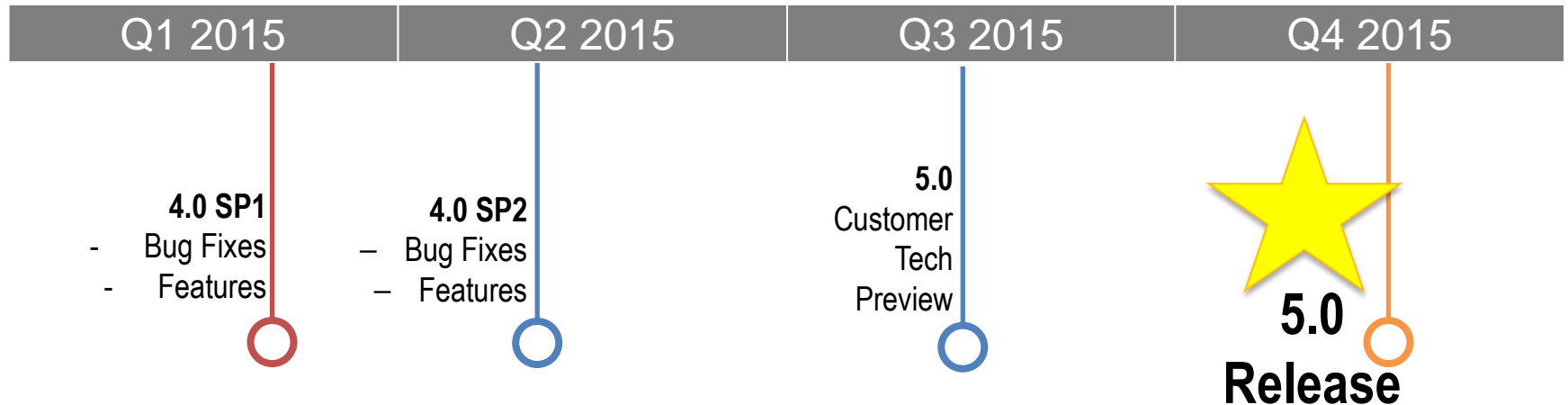**Ellyn LaVecchia**
Direct Marketing
Cause and Cure

Nigel Crymble
International

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Roadmap Themes

Expansion	Efficiency	Fortification	Simplification
(v 2.x) *2012*	(v 3.x) *2013*	(v 4.x) *2014*	(v 5+) *2015*
Focus on breadth of fundraising and marketing capabilities	*Focus on accessibility via mobile devices and more wizard-driven processes*	*Focus on usability, quality, performance, and ongoing innovation*	*Focus on infrastructure and program cost reductions, ease of use, and extensibility*

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2015 Roadmap

Q1 2015	Q2 2015	Q3 2015	Q4 2015

4.0 SP1
- Bug Fixes
- Features

4.0 SP2
– Bug Fixes
– Features

5.0
Customer Tech Preview

5.0 Release

- SP1 and SP2 continue commitment to Quality, supporting customers drive to 4.0

- Current customers continue to make plans to upgrade to 4.0

- New customers going live after May 2015 will be going live on 4.0

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4.0 Service Pack 1 Highlights

Service Pack 1 Highlights – February Release

New Feature Guide posted in the Blackbaud CRM Community

- Continued focus on Quality and Performance
- Enhancements to the Membership Contribution process
- Usability improvements based on CTP Feedback
- Data Warehouse Enhancements
- Social Media Finder Service for WealthPoint

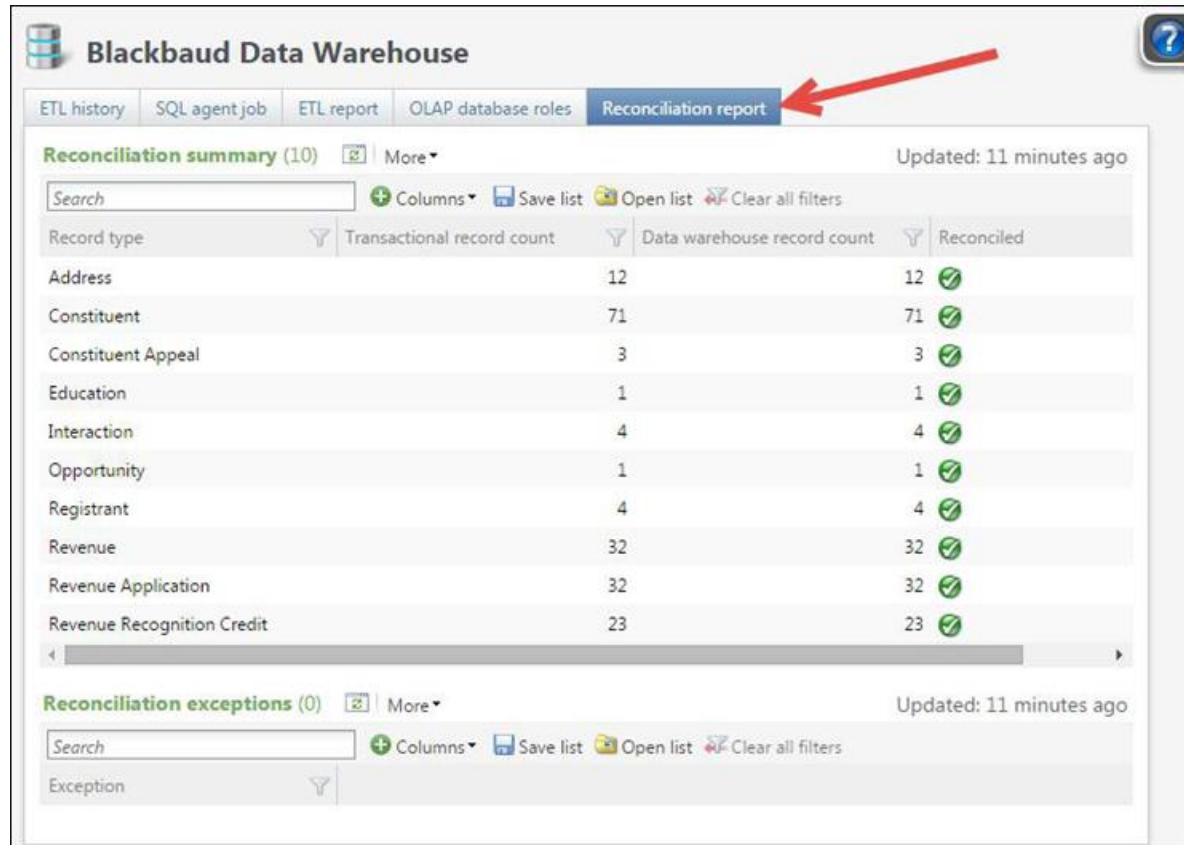Join us for the March Spotlight to get a
deeper dive into SP1!

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4.0 SP1 Data Warehouse Enhancements

Revenue Query

Revenue Recognition
Credits Query

Data Coverage

Reconciliation Report

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Social Media Finder Service

Images

Biography

Ratings

Accounts

4.0 Service Pack 2 Highlights

Service Pack 2 – April Release

- Continued focus on Quality and Performance
- Usability improvements based on CTP Feedback
- Customize KPI Dashboards in WebShell
- Constituent tile for Major Giving

Join us for the April Spotlight to get a
deeper dive into SP2!

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BBCRM Guiding Principles

SYNERGY

- Make BBCRM innovative, consistent, and intelligent
- Leverage 30 years of fundraising experience and all of the innovation emerging across Blackbaud
- Create a more seamless experience with extensions like Payments & Analytics

QUALITY

- Insist on stability, upgradeability, and dependability
- Don't break things
- Make it easier to upgrade to new releases
- Increase innovation built on quality foundation

EFFICIENCY

- Ensure BBCRM is cost-effective, powerful, and responsive
- Make BBCRM less expensive to set up, configure, and operate

INNOVATION

- Deliver a product that is flexible, inclusive, and contemporary
- Partner with Industry Leaders to drive capabilities expansion
- Work to make the hosting experience as flexible as the on premise experience

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2015 BBCRM Initiatives

Take a closer look!

Credit Card Account Updates

Card holders experience changes to their credit card account information for many reasons:

- updated expiration dates
- replacements for lost, stolen, or reissued credit cards
- closed credit card accounts
- bank mergers

When account information changes, cardholders often do not contact your organization, resulting in:

- declined transactions
- operational expenses
- recurring gift cancellations

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Name and Address Formats

- We sometimes handle names the same when they are actually different based on their location

Ordered alphabetically (US/CA):	Ordered alphabetically (NL):
Andy Van Slyke *(American Baseball Player)*	Art Vandelay *(Fictional Latex Mogul)*
Art Vandelay *(Fictional Latex Mogul)*	Dick Van Dyke *(American Actor)*
Dick Van Dyke *(American Actor)*	Andy Van Slyke *(American Baseball Player)*
Jan van de Velde *(Dutch Painter)*	John Vande Velde *(American Cyclist)*
Jean van de Velde *(French Golfer)*	Jean van de Velde *(French Golfer)*
John Vande Velde *(American Cyclist)*	Jan van de Velde *(Dutch Painter*

- We sometimes handle the addresses the same when they are different based on the country

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Day of Event Check-In

- Check-In today is very manual, lots of duplicate entry

- Event managers are using spreadsheets or 3rd party systems that don't integrate with BBCRM for check-in

- Different processes to register and take payments or donations

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Fundraiser on the Go

- Fundraisers spend most of the day away from their desks
- Fundraisers use their phones or iPads to seek information about their prospects and donors
- Fundraisers need to document their visits with prospects

Online Challenges

- Processing transactions should be as easy for online as it is for offline

- Like other data, email data also takes up room in the database

- Online users don't want to login

- More flexibility building online forms

5.0 BBIS Initiatives

Form Availability

Profile Batch Updates

Donation Handling

Donation API

Email Performance

BBSP Mobile Improvements

Directory Display Fields

Discovery Items

Email Workflow & Performance

Transaction API Planning
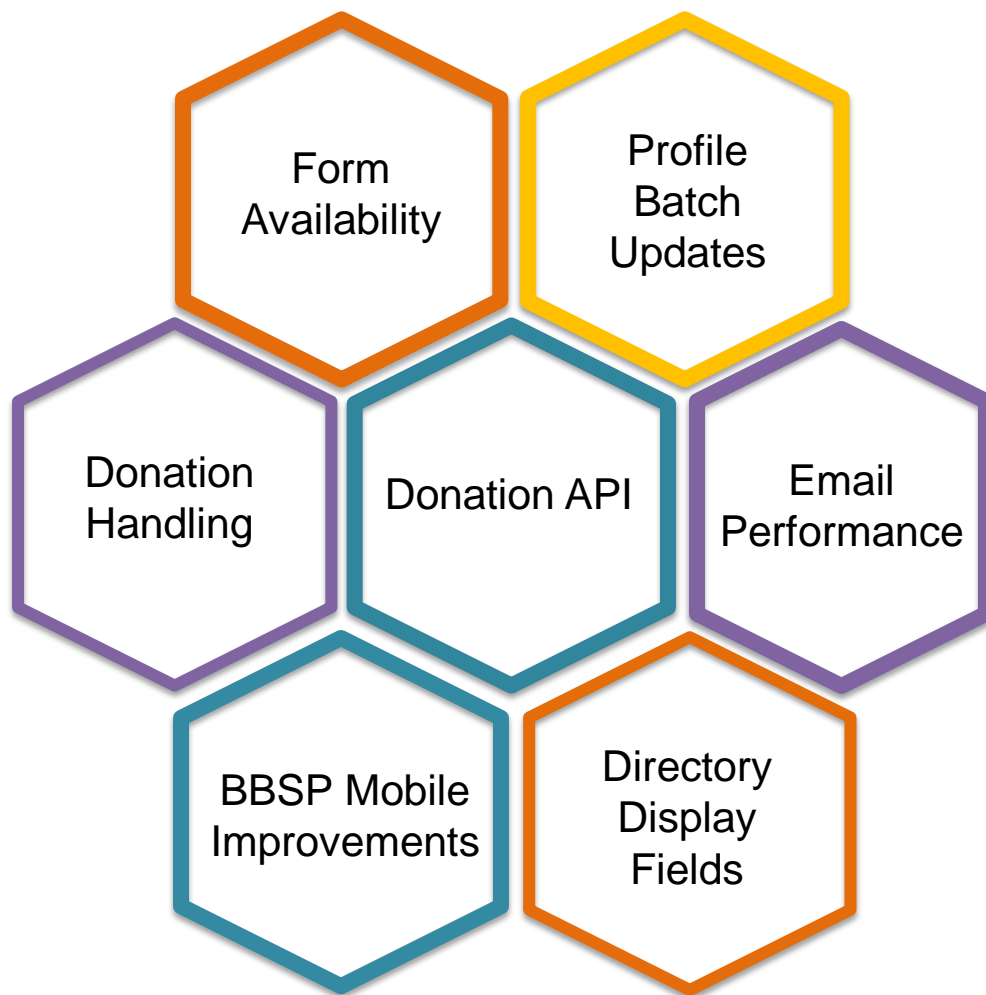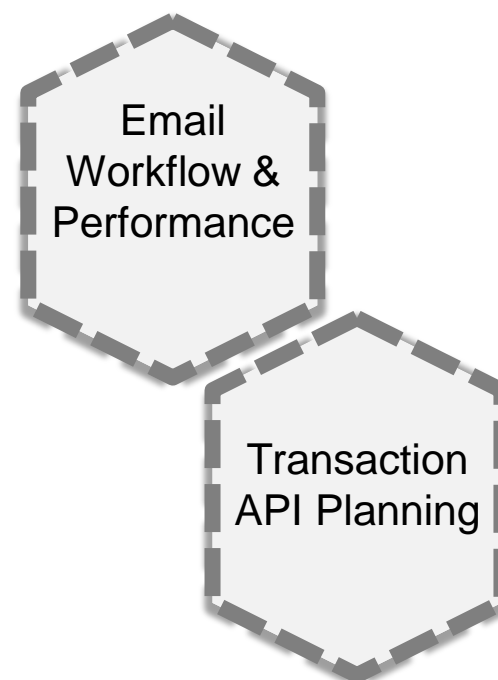
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BBCRM/LO Integration

- Released in January
- Integrates the leading CRM and Online Marketing platforms in the industry (Blackbaud CRM + Luminate Online)
- Applies industry experience resulting from work with tens of thousands of clients
- Creates an integration framework to support shared needs
- Delivers flexibility for client-specific configuration
- Seamless API-based exchange
- Gives you control to manage your business processes

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BBCRM/LO Integrated Solution

Luminate Online

Automated Exchange Sequence

Constituent Model
Demographic • Contact

Duplicate Data
Merges

Revenue Model
Donation • Recurring Gift • Pledge
Tribute • eCommerce purchase

Teamraiser Event Model
Event • Registration • Team

Calendar
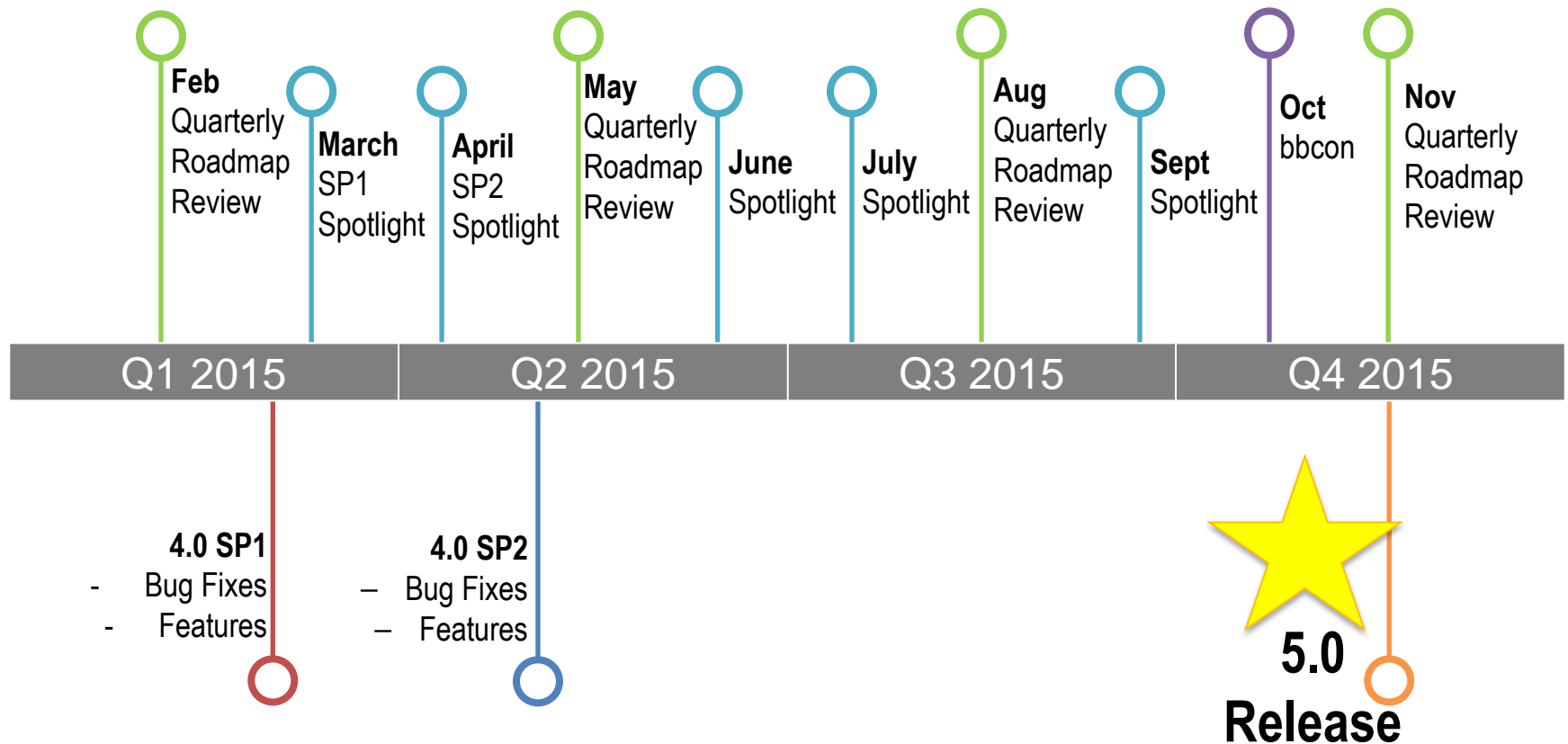Event • Registration

Survey
Response

Blackbaud CRM

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Communication Milestones

Feb Quarterly Roadmap Review

March SP1 Spotlight

April SP2 Spotlight

May Quarterly Roadmap Review

June Spotlight

July Spotlight

Aug Quarterly Roadmap Review

Sept Spotlight

Oct bbcon

Nov Quarterly Roadmap Review

| Q1 2015 | Q2 2015 | Q3 2015 | Q4 2015 |

4.0 SP1
- Bug Fixes
- Features

4.0 SP2
- Bug Fixes
- Features

5.0 Release

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Please Share Your Feedback!

Email the presenters directly @blackbaud.com	Engage in the CRM Community blackbaud.com/bbcrm	Participate in product discovery blackbaud.com/bbcrm Events **>** Product Discovery	Share your thoughts in the ideabank blackbaud.com/bbcrm Resources **>** Share Ideas

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