

# Blackbaud Grantmaking Townhall



DECEMBER 2018

*Blackbaud Grantmaking formerly GIFTS Online*



# Blackbaud Grantmaking Townhall **Agenda**

- ▶ Introductions
- ▶ Blackbaud Grantmaking Updates
- ▶ What's new in Blackbaud Grantmaking and Blackbaud Outcomes
- ▶ What's next in Blackbaud Grantmaking and Blackbaud Outcomes
- ▶ Updates & Reminders
- ▶ Q&A

# Webinar Hosts

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# Blackbaud Grantmaking Updates

# Blackbaud Grantmaking **Updates**

- 1) Rollout of Blackbaud Grantmaking in SKY timing
- 2) Blackbaud Grantmaking MAC Users accessibility
- 3) Blackbaud Grantmaking reported slowness



# What's New Blackbaud Grantmaking and Outcomes

## STRENGTHEN COLLABORATION

# Transitioning Blackbaud Grantmaking to SKY Available Now!

The image displays two views of the Blackbaud Grantmaking dashboard. The top view is a desktop screenshot showing a navigation menu on the left with 'Raiser's Edge NXT', 'Financial Edge NXT', and 'Grantmaking' (selected). The main content area is divided into three sections: 'Grants' with a bar chart showing 545 Pending, 811 Approved, and 176 Declined; 'Application inbox' showing 17 Applications and 'March 22, 2018 Last received'; and 'Tasks' with 123 tasks and a list of items like 'Program Manager Review' and 'Review RFP'. The bottom view is a mobile screenshot showing a 'Work center' overlay with 'Overview' and 'Grants 1538' tabs, and the same dashboard content below it.

- Dashboards driven by your workflow
- Application inbox
- Admin user and permissions management
- Any browser, any device

*What's New*

## TRANSFORM YOUR EXPERIENCE

# Blackbaud Grantmaking SKY View Available Now!

The screenshot displays the Blackbaud Grantmaking SKY View interface. The desktop view shows a navigation bar with 'Grantmaking' and 'Grants' tabs. Below the navigation bar, there are tabs for 'Pending', 'Approved', 'Declined', and 'All grants'. A 'Filters' section is visible, with filters for 'Program area: Health and Human Services' and 'Grant type: Cash grants'. The main content area is divided into several sections: 'Grants by status' with a bar chart showing counts for various stages (Initial review: 2, Due diligence: 3, Initial program review: 0, Ready for board: 14, Board deferred: 7, Budgeted line item: 13, Board deferred: 7, No status: 13); 'Application inbox' showing 14 Applications and 'July 12th, 2018 Last received'; and 'Recently accessed' grants with a list of items like 'Fundraiser Dinner for Parks & Rec USA' and 'Flu shot and home test kit po'. A mobile view overlay is shown on the right, featuring a 'Menu' bar, a 'Work center' section with 'Overview' and 'Grants 1538', a 'Grants' section with a bar chart showing counts for 'Pending (551)', 'Approved (81)', and 'Declined (176)', an 'Application inbox' section showing '17 Applications' and 'March 28, 2018 Last received', and a 'Tasks' section.

- Personalize your home screen with saved filters
- Easily find your Pending, Approved, and Declined grants
- Find any grants in "All grants" with powerful filter options
- Quickly return to "Recently accessed" grants

*What's New*



INCREASE  
EFFICIENCY

## Blackbaud Grantmaking SKY View Available Now!

The screenshot displays the Blackbaud Grantmaking SKY View interface. The main page is titled "Grants" and features tabs for "Pending", "Approved", "Declined", and "All grants". A "Filters" button is visible. Below the tabs, there is a "Grants by status" section with a "Grant type" dropdown set to "Cash Grants". A bar chart shows the following counts: Budgeted Line Item (17), Considered for Board (13), Initial Review (87), Staff Review (12), Ready for Export (8), Exported to FIMS (3), and No status (451). Below this is an "Application inbox" section showing 11 Applications and the last received date as November 15, 2018, with a "Go to application inbox" button. A contextual help panel is open on the right, titled "Grant tabs", providing instructions on how to view grants by disposition (Pending, Approved, Declined, and All grants) and describing the content of each tab. The help panel also includes links to "Community", "Knowledgebase", and "Case Central".

- New contextual Help content, when you need it
- Guided tour to help your staff get started on Blackbaud Community

<https://community.blackbaud.com/products/grantmaking/resources>

*What's New*




## MEASURE YOUR IMPACT

## Blackbaud Outcomes Available Now!

Outcomes progress updates

Export Find in this list

33 Submitted

Progress update	Project title	Grantee	Date submitted	Date due
35 of 47	<a href="#">Request ID 1681</a>	Michelle Ortega	 10/02/2018	06/09/2018
35 of 44	<a href="#">Request ID 1647</a>	Miles Meeker	10/02/2018	10/13/2018
9 of 83	<a href="#">Request ID 1640</a>	Walk for Health Organization	 09/14/2018	03/11/2017
1 of 9	<a href="#">Request ID 1649</a>	Saving Grace	08/06/2018	08/18/2018
1 of 157	<a href="#">Request ID 1591</a>	Coats for All	 06/08/2018	06/04/2016

Outcomes summary dashboard

Total grants information summary

243 Awarded grants	£29,857,609.97 Amount awarded	May 5, 2008 Earliest project start date	May 7, 2023 Last project end date	 7,239 Overdue progress updates
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Impacted U.N. Sustainable Development Goals

 1 NO POVERTY <a href="#">View details</a>	 2 ZERO HUNGER <a href="#">View details</a>	 3 GOOD HEALTH AND WELL-BEING <a href="#">View details</a>	 4 QUALITY EDUCATION <a href="#">View details</a>	 6 CLEAN WATER AND SANITATION <a href="#">View details</a>
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- On-demand data export from Dashboards
- Late warning icon added to progress updates dashboard
- Sky UX update for latest look and feel

*What's New*

# What's Next

## Blackbaud Grantmaking and Outcomes

## TRANSFORM YOUR EXPERIENCE

# What's Next Blackbaud Grantmaking to SKY Coming Soon!

Payments <span>☰</span>			
<b>\$5,000</b> Paid	<b>\$5,000</b> Scheduled	<b>\$10,000</b> Total	
2 Payments			
<input type="text" value="Find in this list"/> <input type="button" value="Q"/> <input type="button" value="☰"/> <input type="button" value="▼"/>			
Due date ▾	Amount	Status	Fund
09/01/2018	\$5,000.00	Scheduled	Grants fund
06/01/2018	\$5,000.00	Paid	Grants fund

- Financial Management in SKY
- See status of payments at-a-glance for any grant
- Manage upcoming payments
- Accounts payable process
- Interoperability with FE NXT for faster payment processing

*What's Next*

# INCREASE EFFICIENCY

## What's Next Blackbaud Grantmaking to SKY Coming Soon!

The screenshot displays the Blackbaud Grantmaking interface. At the top left, there is a navigation menu with 'Raiser's Edge NXT', 'Financial Edge NXT', and 'Grantmaking' (selected). A user count of '1532' is shown next to 'Grantmaking'. The main content area is divided into several panels:

- Grants:** A summary panel showing 'Pending (545)', 'Approved (811)', and 'Declined (176)' with corresponding horizontal bars.
- Tasks:** A list of 123 tasks, including 'Program Manager Review' for a \$0.00 grant for 'Orgname14' and 'The April and Brady Foundation', both marked as 'Not Started'.
- Application inbox:** Shows 17 applications received on March 22, 2018.
- Custom fields:** A table for managing custom fields with columns for 'Field label' and 'Value'. It includes a search bar and pagination controls.
- Documents and attachments:** A detailed view of a document, including 'Invited Review Notification' and 'HTML Version of Application'. It lists file names, upload dates, subjects, authors, and organizations.

- Full view of a grant on one page
- All related documents and attachments
- Custom fields

*What's Next*

## STRENGTHEN COLLABORATION

# What's Next Blackbaud Grantmaking to SKY Coming Soon!

The screenshot displays the Blackbaud Grantmaking interface. On the desktop, the navigation menu includes 'Raiser's Edge NXT', 'Financial Edge NXT', and 'Grantmaking' with a count of 1532. The main content area is divided into three sections: 'Grants' with a bar chart showing 545 Pending, 811 Approved, and 176 Declined; 'Application inbox' showing 17 Applications and the last received date as March 22, 2018; and 'Tasks' showing 123 tasks. A mobile device is overlaid on the desktop view, displaying a 'Work center' overlay with a 'Menu' button, a 'Thrive on GO - Thrive on GO' banner, and a 'Grants 1538' overview section. The mobile view also shows the same 'Grants' and 'Application inbox' sections as the desktop view.

- Invite other users to Grantmaking in SKY
- Manage users and permissions

*What's Next*

## MEASURE YOUR IMPACT

## Blackbaud Outcomes Coming Soon!

The screenshot displays the 'Outcomes progress updates' interface. At the top, there is an 'Export' button and a search box labeled 'Find in this list'. Below this, it indicates '33 Submitted'. A table lists progress updates with columns for 'Progress update', 'Project title', 'Grantee', 'Date submitted', and 'Date due'. The table contains three rows of data:

Progress update	Project title	Grantee	Date submitted	Date due
35 of 47	Request ID 1681	Michelle Ortega	10/02/2018	06/09/2018
35 of 44	Request ID 1647	Miles Meeker	10/02/2018	10/13/2018
9 of 83	Request ID 1640	Walk for Health Organization	09/14/2018	03/11/2017

Below the table, there is a 'Filter page' dialog with the following sections:

- General
- Dates
- Coding
- Age group: Select age group
- Population served: Select population served
- Program area: Select program area
- Recipient organization: Select recipient organization
- Subject: Select subject

At the bottom of the filter page are buttons for 'Apply filters', 'Clear all filters', and 'Cancel'. In the background, an 'Edit measurement' dialog is visible, asking 'What is being measured?' (with 'A Custom Measurement' entered) and 'How is this measurement aggregated in reports?' (with 'Sum' selected). Other options include 'Average' and 'Percentage'. 'Save' and 'Cancel' buttons are at the bottom of the dialog.

- Outcomes available to Reviewers
- New filters on the Summary Dashboard
- Improved portal experience for grant partners

*What's Next*

Q3 2018

Q4 2018

1H 2019

FUTURE

## Early Access Program (EAP)

- Additional waves of EAP customers onboarded
- Many volunteers, but limited spots in EAP. Thank you for your interest!
- Collecting feedback from EAP participants and discovery calls.

## Admin Access – All Customers

- Admins will receive emails when SKY View is available for your organization
- No disruption to your staff – Classic View keeps working, SKY View becomes available at a new page
- Admins control the roll out to rest of staff

## Casual User Milestone

- Ideal for light-touch users: program staff, board members, and read-only users
- Easy to learn, easy to access
- All their data available – for work, analysis, and reporting

## Admin User Milestone

- All users able to use SKY View for their daily work, including
- Admins, grants managers, and other power users have all needs met in SKY View
- Frequent updates – you decide when to use SKY View, and when to use Classic View



# {Grantmaking}

# Roadmap

Q3 2018

Q4 2018

Q1 2019

FUTURE

## Rollout

- 50 customers live on Early Access Program

## Grantmaking Efficiency

- Home screen with Tiles
- Grant List filters
- Ease of onboarding users

## Data & Analytics

- Audit trail

## Outcomes & Impact

- Issue Resolution

## Rollout

- Delivering access for admin users

## Grantmaking Efficiency

- Home screen personalization
- Recently accessed grants
- Help and Getting Started content

## Data & Analytics

- Home screen tile improvements

## Outcomes & Impact

- Outcomes Data Extraction / Availability

## Rollout

- Delivering access for admin users (continued)

## Grantmaking Efficiency

- International Availability
- Custom fields for grants
- Manage documents
- Approve / Decline Grants

## Financial Management

- Payments
- Accounts payable process
- Interoperability with FE NXT

## Data & Analytics

- SKY Reporting

## Outcomes & Impact

- Reviewer Access to Outcomes data

## Rollout

- **End of 1H 2019:** Casual user milestone. Program officers, read-only users, etc. using SKY View
- **End of 2H 2019:** Admin user milestone. All users using SKY View.

## Grantmaking Efficiency

- Cross system searching
- Manage Grant Requirements, Reviews
- Generate Documents, Activities
- Manage Scholarships

## Financial Management

- Budget Management / Forecasting

## Data & Analytics

- Cross solutions SKY Reporting

## Relationship Management

- Contacts interoperability w/ RE NXT
- Search for non-profits, by Outcome
- Grantee Portal updates

**Legend:** ■ Market Ready ■ In Progress ■ Proposed ■ Under Consideration

# Blackbaud Updates & Reminders

# Updates/Reminders

- Blackbaud Grantmaking Support # is changing on Dec 10<sup>th</sup> to [1.800.468.8996](tel:18004688996)
- Reminder: Create your BBID
  - [How to invite a user to create a BBID](#)  
(on kb.blackbaud.com)

# Upcoming Events

## Upcoming Webinar.

@Thursday Dec 6 at 2pm

**Measuring Impact with Blue Cross<sup>®</sup> and Blue Shield<sup>®</sup> of Louisiana**

## Upcoming Event Sign-up

<https://community.blackbaud.com/events>

<select> **Blackbaud Corporations and Foundations**

## Blackbaud Corporations and Foundations Hub

<https://foundations.blackbaud.com/>

User Stories, White Papers, Webinar Recording



# Q&A

Thank you!

The Blackbaud logo is positioned in the bottom right corner of the slide. It consists of the word "blackbaud" in a white, lowercase, sans-serif font, with a registered trademark symbol (®) to its upper right. The logo is centered within a large, teal-colored diamond shape. This diamond is part of a larger graphic design that includes several other teal shapes: a smaller diamond above and to the left, and another smaller diamond below and to the right, all separated by white lines. The background of the slide is a light gray gradient, and the top right corner features a dark green gradient.

blackbaud®



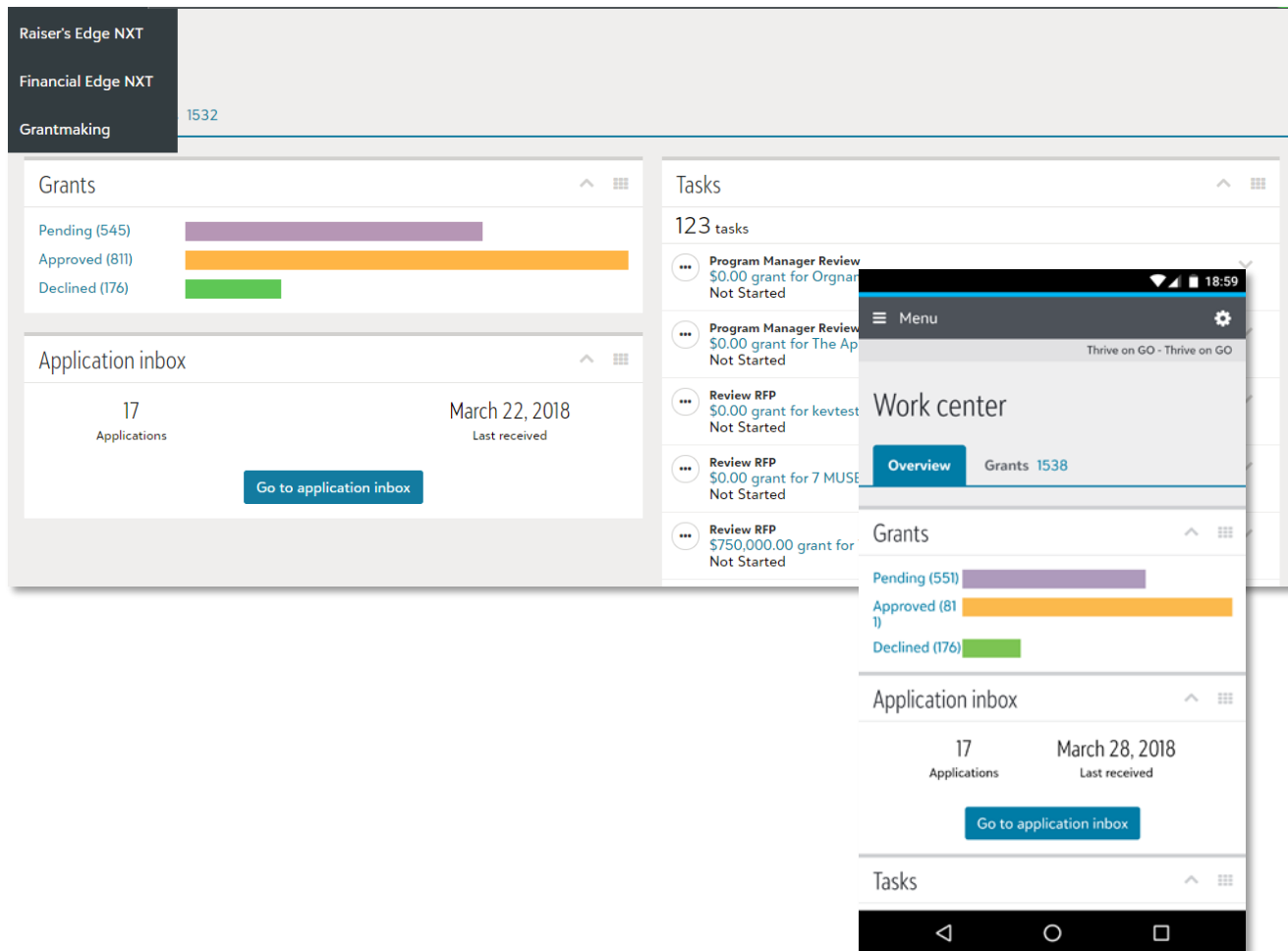
# Appendix

# What is Blackbaud Grantmaking SKY View?



## INCREASE EFFICIENCY

# Any device, any browser



- Access your data from any device, in any browser
- Same features and design on your computer, tablet, and phone
- Adapts to your screen size
- No browser plug-ins

INCREASE  
EFFICIENCY

# Personalized for your workflow

The screenshot displays a web application for grantmaking. At the top, there's a navigation bar with 'Grantmaking' and 'Grants' tabs. Below this, the main header shows 'Grants' with sub-tabs for 'Pending', 'Approved', 'Declined', and 'All grants'. A filter bar indicates 'Program area: Health and Human Services' and 'Grant type: Cash grants'. The main content area is divided into 'Grants by status' and 'Recently accessed'. The 'Grants by status' section shows a bar chart with categories like 'Initial review (2)', 'Due diligence (3)', 'Ready for board (14)', etc. An 'Application inbox' at the bottom shows '14 Applications' and 'July 12th, 2018 Last received'. A modal window titled 'Edit workflow stage' is open, showing a multi-step process (1. General information, 2. Initial actions, 3. Tasks, 4. Completion actions). The 'Completion actions' step is active, showing a condition 'If requested amount is greater than \$5,000.00' and an action 'Activate a workflow stage' with 'Executive review' selected. Buttons for 'Apply', 'Cancel', 'Previous', 'Save and Close', and 'Cancel' are visible at the bottom of the modal.

Personalized work center

Configurable workflows to  
customize task reminders

Ability to resume recent work

Ability to know “What do I need  
to do on today?”

## INCREASE EFFICIENCY

# Work smarter and faster

The screenshot displays the 'Grantmaking' application interface. A central 'Consider applications' dialog box is open, showing a match-finding process. The dialog has three tabs: '1. Organizations (1)', '2. Contacts (1)', and '3. Consider'. The 'Organizations' tab is active, displaying a match for 'Transport Workers Union of America' with address '50654 Walter Viaduct 742130059'. A 'Match found' section shows the same organization name. Below this, there are buttons for 'Link this record' and 'Add or search for a record'. A question mark icon is visible next to the match information.

In the background, the 'Application Inbox' is visible, showing a list of applications with columns for 'Request amount' and 'Date submitted'. A filter is applied: 'Request amount: Greater than'. Below the inbox, there are statistics: '0 Organizations linked' and '0 Organizations created'.

In the foreground, a 'Filters' panel is open, showing various filter options:

- General
- Dates (selected):
  - Decision date: Specific range (dropdown)
  - From: [calendar icon]
  - To: [calendar icon]
- Coding
- Request date: Any (dropdown)
- Meeting date: Any (dropdown)
- Project start date: Any (dropdown)
- Project end date: Any (dropdown)

Buttons at the bottom of the filters panel: 'Apply filters', 'Clear all filters', and 'Cancel'.

- Process grant applications quickly with the new application inbox
- Smart recommendations help you avoid duplicate contacts and messy data
- Search, sort, and filter any list while you're working

INCREASE  
EFFICIENCY

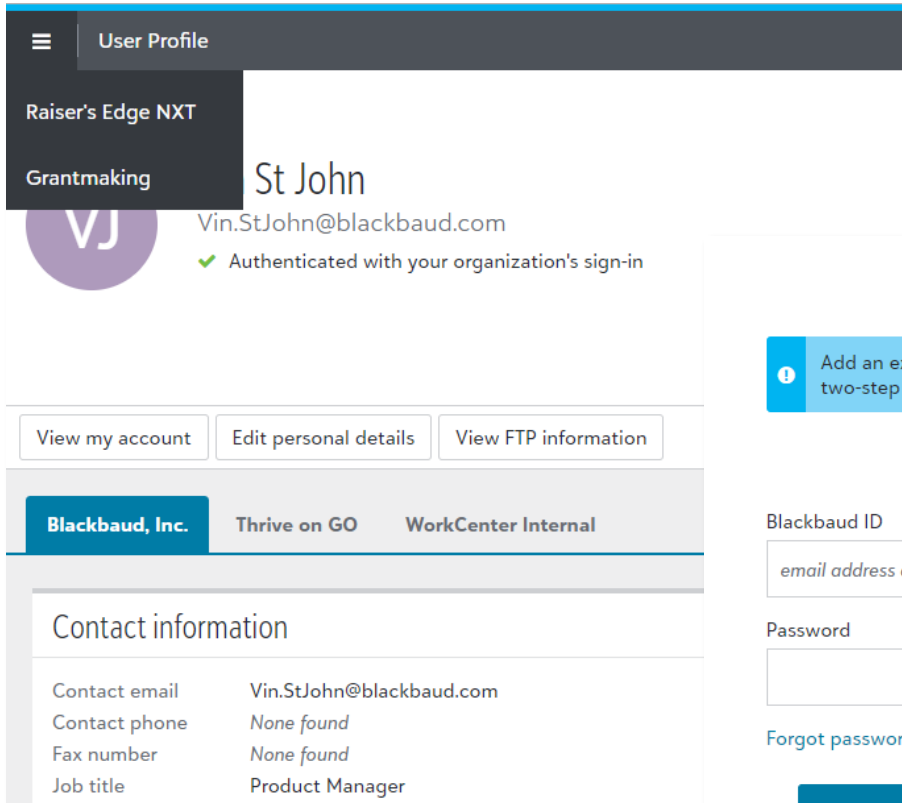
# Information at your fingertips

The screenshot displays a user interface for managing grant information. On the left, a contact card for 'Grant primary contact' shows details for Ms. Shawna Dawn, Executive Director, including phone numbers and an email address. On the right, a 'Payments' summary table provides a high-level overview of financial data.

Due date	Amount	Status	Fund
09/01/2018	\$5,000.00	Scheduled	Grants fund
06/01/2018	\$5,000.00	Paid	Grants fund

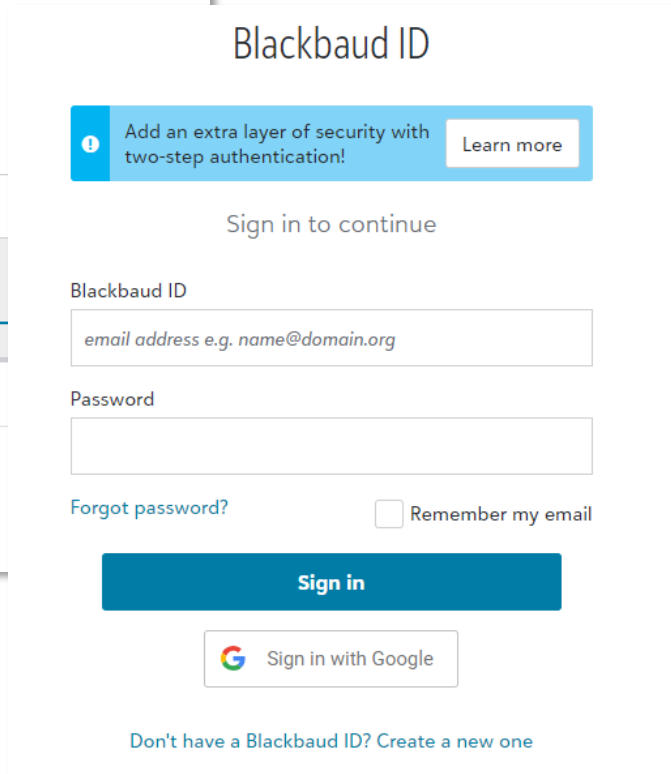
- Quickly look up grants, organizations, contacts, and payments
- Call or email a contact with one click
- Look up directions on your way to a site visit
- Quick summaries of an organization's grants, upcoming payments, and more

## INCREASE EFFICIENCY



A screenshot of a user profile page. The header shows a hamburger menu icon and the text "User Profile". Below this, there are navigation tabs for "Raiser's Edge NXT" and "Grantmaking". The user's name "St John" and email "Vin.StJohn@blackbaud.com" are displayed, along with a purple circular profile picture containing the initials "VJ". A green checkmark indicates the user is authenticated. Below the profile information are three buttons: "View my account", "Edit personal details", and "View FTP information". At the bottom, there are logos for "Blackbaud, Inc.", "Thrive on GO", and "WorkCenter Internal". A "Contact information" section lists details for contact email, phone, fax, and job title.

Contact email	Vin.StJohn@blackbaud.com
Contact phone	None found
Fax number	None found
Job title	Product Manager



A screenshot of the Blackbaud ID sign-in form. The title is "Blackbaud ID". A blue banner at the top contains an information icon, the text "Add an extra layer of security with two-step authentication!", and a "Learn more" button. Below the banner is the text "Sign in to continue". The form includes a "Blackbaud ID" field with a placeholder "email address e.g. name@domain.org", a "Password" field, a "Forgot password?" link, and a "Remember my email" checkbox. A prominent blue "Sign in" button is located below the fields. At the bottom, there is a "Sign in with Google" button and a link "Don't have a Blackbaud ID? Create a new one".

## Intuitive and familiar

- Consistent experience across Blackbaud solutions
- Blackbaud ID: One login for grantmaking, fundraising, financials, Blackbaud Community, and more
- SKY UX: Shared design language across Blackbaud solutions

INCREASE  
EFFICIENCY

# Designed for your whole team

The image shows two overlapping screenshots from the Blackbaud system. The top screenshot is the 'Add user' form, which includes fields for 'Name' (filled with 'Vin St. John') and 'Email' (filled with 'vin.stjohn@blackbaud.com'). Below these fields is a 'Security' section with a 'Make admin' checkbox. A 'Grantmaking' section is also visible, featuring a checked checkbox and a dropdown menu set to 'Grants manager'. At the bottom of the form are 'Send invite' and 'Cancel' buttons. The bottom screenshot is an email invitation titled 'Welcome to Blackbaud!'. It contains the text: 'Your organization is ready for you to log in to its Blackbaud services. Don't wait too long! This invitation expires in 30 days.' Below this text is a blue 'Accept Invitation' button. Further down, it says 'Want more information? Training and Help'. The email is signed 'Sincerely, The Blackbaud Team' and includes a green footer with 'Privacy Policy' and '© 2017 Blackbaud'.

- Getting started guide and online help
- Admin controls to roll out access to your staff
- Approachable design tested with experts AND newcomers
- Supplements your existing experience in Classic View

# Blackbaud Grantmaking Experience

## One Dataset, Two Views

### Classic View

### SKY View

The Classic View interface is a traditional web-based form. The top section shows a request for '\$15,000.00 on 01/26/2018' for 'The Children's Fund'. The form is divided into sections: 'General' (Type: Cash Grants, Status: Pending In Progress, Reference No., Staff: Sara Barad), 'Request' (Request Date: 01/26/2018, Project Budget: \$0.00, Requested Amount: \$15,000.00, Recommended Amount: \$15,000.00), and 'Organization' (The Children's Fund, Washington, DC). A sidebar on the left contains navigation links like 'Payments', 'Requirements', and 'Reviews'. Below the form is a dashboard with two charts: 'Area of Activity' (a horizontal bar chart showing funding by category like 'Vulnerable Groups' and 'Senior Citizens') and 'Outreach Countries' (a vertical bar chart showing funding by country like 'United States' and 'Canada').

The SKY View interface is a modern, card-based dashboard. The top card is 'The Children's Fund' with a 'Health and Human Services' tag. Below it is an 'Organization Summary' card with fields for 'Legal name', 'Tax ID', 'Registration date', and 'Tax status'. To the right is a 'Background' card with a text description of the organization's mission. The main section is the 'Work center' for 'Grants 898'. It features a 'Grants' summary with 'Pending (43)', 'Approved (775)', and 'Declined (80)'. Below this is an 'Application inbox' showing '7 Applications' and 'March 12, 2018' as the last received date. On the right, a 'Tasks' section lists '10 tasks', including 'Initial grant review' and 'Due diligence checks' for various grants.

# Blackbaud Outcomes



# Outcomes **Available Now**

**New Details** on Email Reminders

**Group Management** in Blackbaud Outcomes™

**Flexibility to Require** Measurements

**Measurement Validation** in Applications

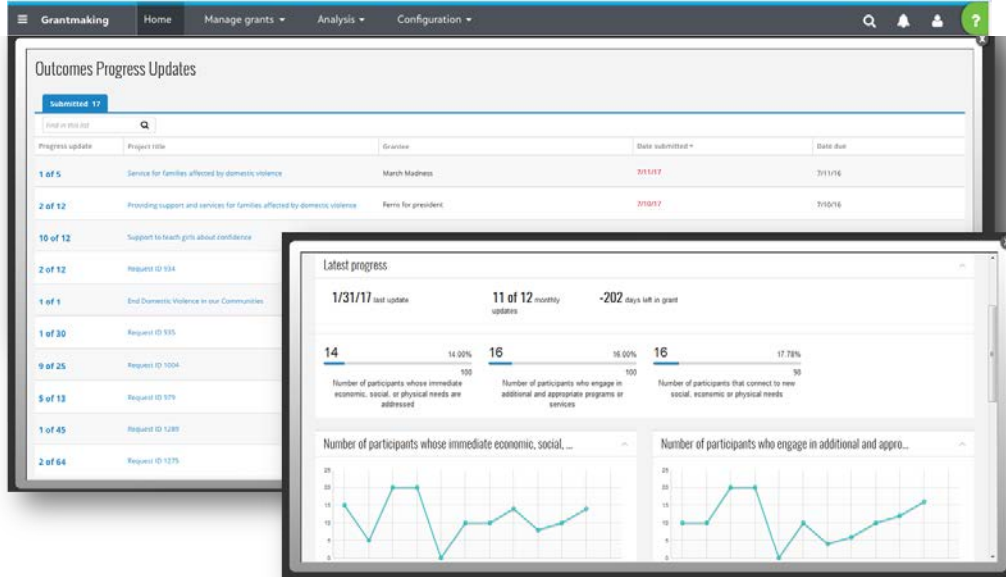
**Progress Dashboard** w/ Grantee Names

**Maintenance Updates**

**Align Progress Updates** with Grant Dates

## Impact Measurement

# Outcomes Roadmap Q3 2018



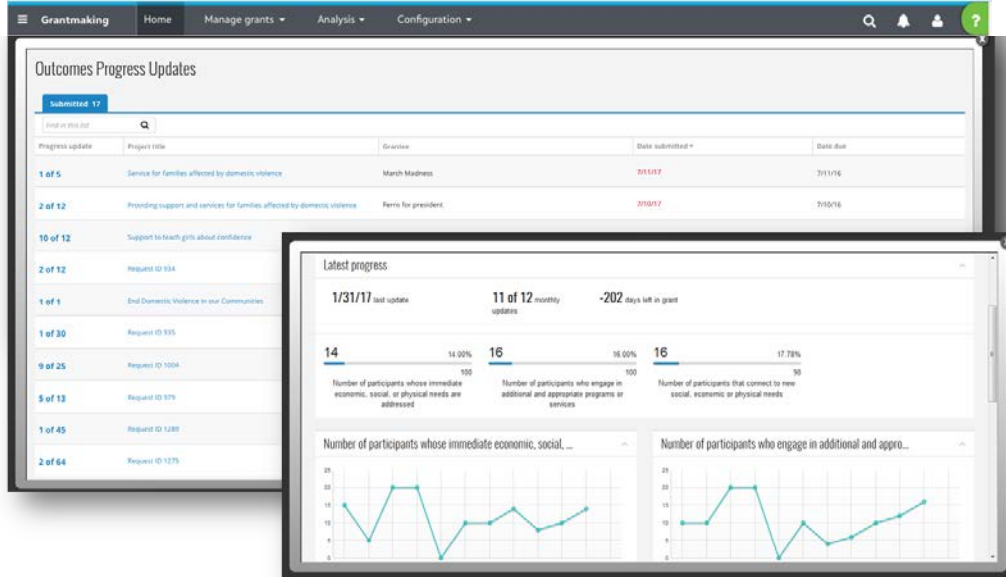
Data Export from Dashboards

New Data Filters on Dashboards

Maintenance Updates

## Impact Measurement

# Outcomes Roadmap Q4 2018



Outcomes Available to Reviewers

Transition all Applicants to the Grant Portal

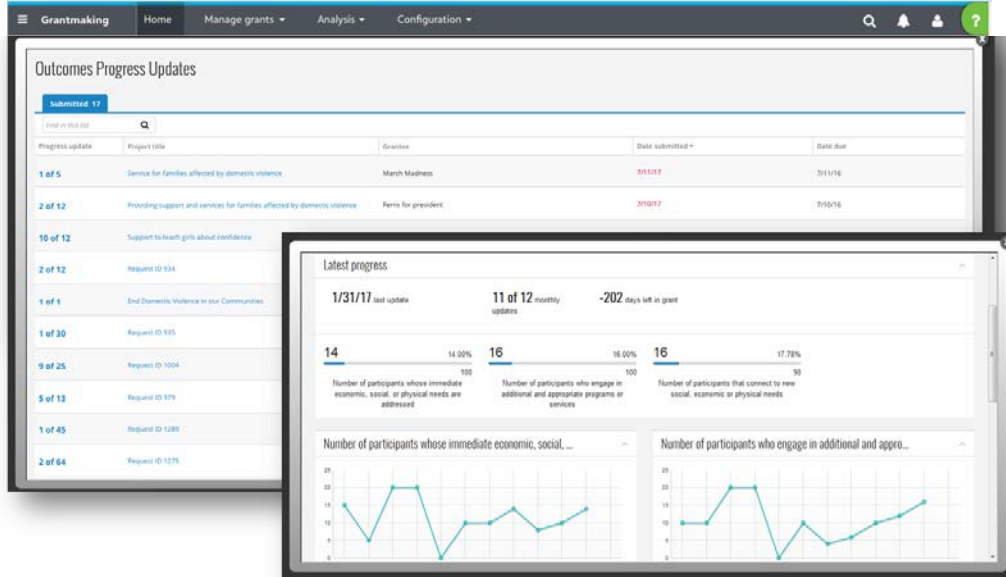
Transition Outcomes to SKY 2.0

Outcomes Reporting Updates

## Impact Measurement

Legend: ■ Proposed

# Outcomes Roadmap Future



Outcomes in BB Grantmaking SKY View

Taxonomy enhancements Outcomes Search

Data Extraction 2.0 from Dashboards

Org Profile and Outcomes Tracking for Grantees

## Impact Measurement

Legend: ■ Future

# Where does Product Marketing fit in?

Product Marketing can help when:

- You need positioning help against competitors
- You need pricing help especially when dealing with multi product deals or high user counts
- You have ideas about how we can better package or bundle a solution for a prospect or customer or better yet, a group of customers
- You have questions about published road map items
- [elizabeth.marenakos@blackbaud.com](mailto:elizabeth.marenakos@blackbaud.com)

**bbcon 2018**  
OCTOBER 9-11, 2018 | ORLANDO, FL



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for Social Good

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# BBCON 2018 Grantmaking Sessions of Interest:

- ▶ Blackbaud Corporate and Foundation Solutions bbcon Kickoff and Super Session
- ▶ A Holistic Approach to Grantmaking: Blackbaud Foundation Solutions
- ▶ How the Global Philanthropy Environment Impacts You
- ▶ Solution Roadmap for Foundations
- ▶ Managing Disaster Relief: Interactive Panel Discussion
- ▶ Blackbaud Grantmaking Tips and Tricks
- ▶ The 990 A Public Document: What You Need to Know Now
- ▶ How Blockchain Can Impact Your Data
- ▶ Blackbaud Grantmaking and Blackbaud Outcomes: Tips and Tricks
- ▶ Collaborative Grantmaking Practices
- ▶ Customer Round Robin: Blackbaud Grantmaking

# Blackbaud Grantmaking Townhall Recap

- ▶ Review Grantmaking Townhall and bbcon Roadmap slides
- ▶ Check out the Grantmaking FAQ, Ask questions
- ▶ Start using Grantmaking in SKY
- ▶ Connect with the CSM team on Blackbaud.com
  - Visit the Knowledgebase (<http://kb.blackbaud.com/>)
  - Create a Case via Blackbaud.com via Support > > Case Central
  - Review How-To-Documentation on our website (<https://www.blackbaud.com/howto/>)
  - Check out the product Community websites (<https://community.blackbaud.com/home>)
- ▶ Connect with our team members, Provide feedback on our development



# Meet Your C&F Customer Success Team

# Blackbaud C&F Customer Success Team



# When Should I Involve Customer Success?

Customer escalations

Product best practices

Industry trends

Customer needs help with a non-technical or billing issue

# What Can't Customer Success Help With?

Invoice/billing questions

Technical problems

Sales support

RFP assistance

# Contacting Customer Success



CorpFoundationsCustomerSuccess@blackbaud.com

## Technical Questions?

Access Knowledgebase, Support Chat, and other support resources online at:  
[blackbaud.com/support](https://blackbaud.com/support)

## Billing Questions?

If you need help with an invoice, you can call 1.800.468.8896 Option 4, sub-option 2 or email:  
[BlackbaudAccounts.Receivable@blackbaud.com](mailto:BlackbaudAccounts.Receivable@blackbaud.com)

## Training Questions?

If you need help with Blackbaud University Training, you can call 1.800.468.8896 Option 3 or email:  
[TrainingHelp@blackabud.com](mailto:TrainingHelp@blackabud.com)

# GRANTMAKING

Increase staff, stakeholder engagement

Drive effective communications

Better-quality grant partner interactions

Streamline processes

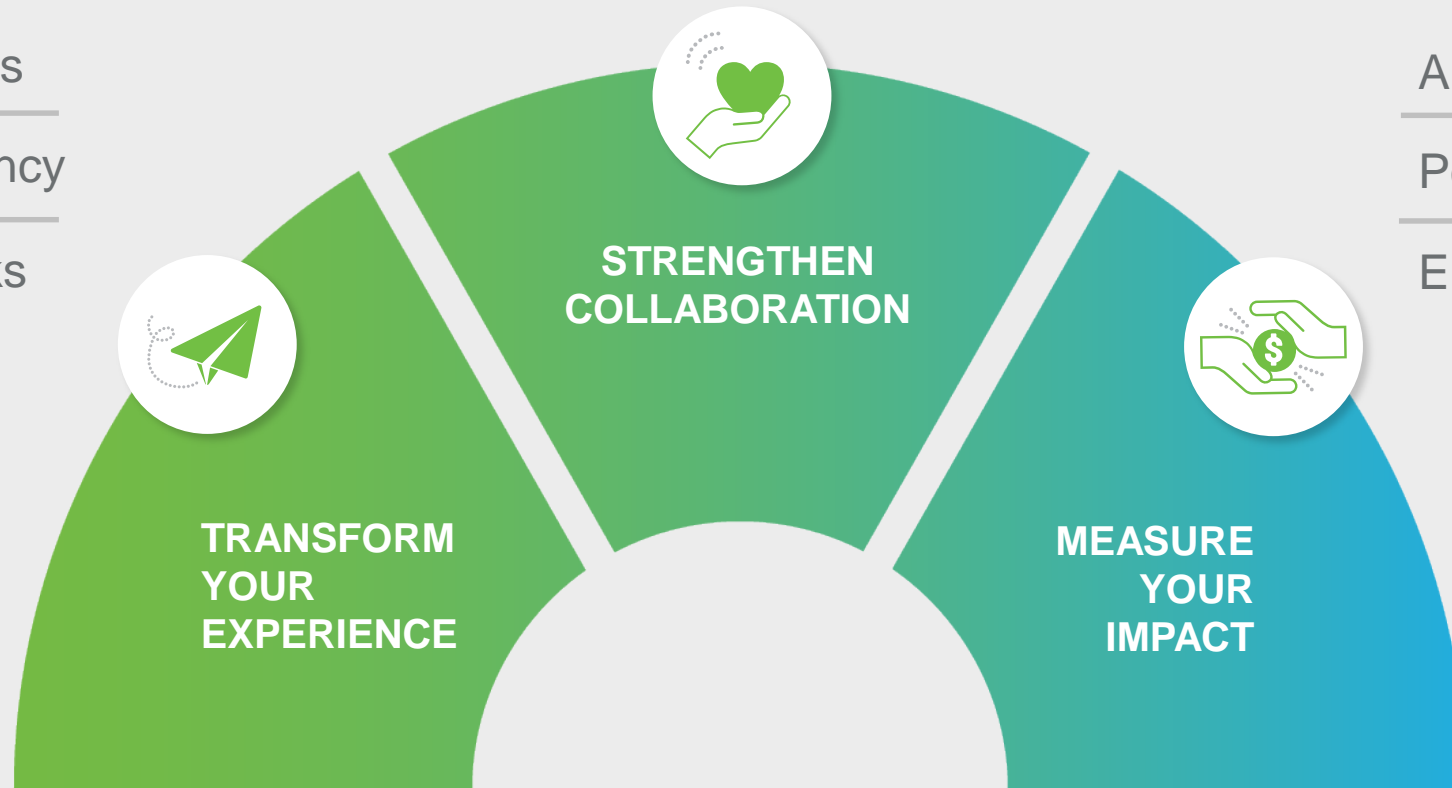
Increase your efficiency

Quick access to tasks

Analytics at your fingertips

Power your outcomes

Enable grantee outcomes



## AMERICAN DIABETES ASSOCIATION

“It’s like being on grant application management cloud nine. We have the system configured to our unique research application review and reporting needs, and we use it all day, every day,”

**MAGDA GALINDO**  
*Director of Research Programs*

