

Raiser's Edge NXT

Design and Mapping – 3 Day Agenda

Customer Preparation

- Onsite sessions must have a suitable space for delivery, WIFI access and screen or projector for presenting
- Remote sessions are delivered either through Microsoft Teams or WebEx
- A member of the project team should be prepared to take notes during the session
- Project team members are encouraged to have their own computers/laptops to use during the session if they “learn through doing”. These computers will need to have [Citrix Receiver](#) installed.
Note - if prompted to enter an email address and create an account during the installation process, select Close as this step is not required.

Day One

| Session | Description |
|-----------|---|
| Session 1 | Introduction <ul style="list-style-type: none"> • Introductions and format of the day • Outline objectives and aims of the design and mapping process |
| Session 2 | Review of Pre-Consultancy Survey <ul style="list-style-type: none"> • Discuss key placement of available fields in Raiser's Edge • Define terminology as required |
| Session 3 | Preparation for data mapping <ul style="list-style-type: none"> • Review of source data • Map all source data into Raiser's Edge NXT • Review all columns for any missing required fields • Review data for required cleaning needed for conversion |
| Lunch | |
| Session 4 | Data Mapping continued |

Breaks will be taken throughout the day as suitable points are reached

Day Two

| Session | Description |
|-----------|--|
| Session 5 | <p>Fact-finding of current customer business processes or time for internal business discussions - Part 1</p> <ul style="list-style-type: none"> • Constituent data management processes <ul style="list-style-type: none"> • Internal responsibilities for gathering, adding, and editing data • Key coding/classification • Consent and communication preferences • Recording correspondence and background notes • Relationships • Audit and quality control checks • Direct Marketing <ul style="list-style-type: none"> • Email campaigns • Online Express <ul style="list-style-type: none"> • E-Marketing |
| Lunch | |
| Session 6 | <p>Fact-finding of current customer business processes or time for internal business discussions – Part 2</p> <ul style="list-style-type: none"> • Donation processing <ul style="list-style-type: none"> • Types of gifts • Process for adding gifts • Detailed gift coding • Thanking process • Online Express <ul style="list-style-type: none"> • Online donation forms |

Breaks will be taken throughout the day as suitable points are reached

Day Three

| Session | Description |
|-----------|---|
| Session 7 | <p>Module-Specific Orientation, depending on modules in subscription. Note: Not all modules can be covered in this session.</p> <ul style="list-style-type: none"> • Event management module <ul style="list-style-type: none"> • Managing different types of events • Ticketing and registration process • Sponsorship • Seating plans and delegate resources • Key tasks before, during and after an event • Reporting • Online Express Event Registration Forms • Prospect management module <ul style="list-style-type: none"> • Prospect and proposal classification • Individual major donors, trusts and foundations. corporate supporters • Reporting • Tribute module |

| | |
|-----------|--|
| | <ul style="list-style-type: none"> • In memory giving data capture and recording • In celebration giving data capture and recording • Communication with fundraiser • Reporting • Volunteer module <ul style="list-style-type: none"> • Jobs carried out by volunteers • Recording skills, abilities, and training • Timesheets • Reporting • Membership management module <ul style="list-style-type: none"> • Membership programmes and categories • Membership configuration • Linked gifts • Benefits • Renewals • Reporting • Alumni management module <ul style="list-style-type: none"> • Primary alumni record • Own establishment vs. other education establishments • Reporting |
| Lunch | |
| Session 8 | <p>Administration and Configuration areas</p> <ul style="list-style-type: none"> • Security - users and groups overview • General settings • Introduction to business rules <p>AOB Close</p> |