Raiser’s Edge NXT: Moving to and Mastering the Next Generation of RE

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Social Goodness

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➤ Make sure to use the hashtag bbcon!
Agenda

1. Brief summary of what “RE NXT” is
   • Resources will be included so you can see more of it later, this is not a demo of the software

2. Why I think we should be so excited about it and interested in it

3. The process of how to move to it to reassure you
   • What you will need to do
   • What you do not need to do or worry about

*Shortened version of roadshow and other presentations
Why I’m Presenting

1. Independent Raiser’s Edge consultant and author who was an angry critic turned enthusiastic fan

2. Working with Blackbaud Product Development and Marketing since February 2014
   • I don’t take any credit for it

3. Have helped over 20 clients evaluate it
   • Implemented as an interim DBA

4. Have a number of clients actively using it
What RE NXT Is
What Raiser’s Edge NXT Is

• It includes the next generation of The Raiser’s Edge
  • Simple, beautiful, modern interface
  • Easier
  • More powerful and functional
  • It’s not just a new “overlay”
• But it’s also much more than “just” RE, it’s a package of RE and Blackbaud software and services
• It’s cloud-based, SaaS (software-as-a-service)
  • Access, backups, upgrades, secure, no IT time or server
• Any time, anywhere, any device
• Unlimited users
What Raiser’s Edge NXT Is

- It’s role-based (fundraiser, executive, administrator…)
- It’s prescriptive (lost, overdue, no contact, birthday…)
- It’s a more integrated Blackbaud experience
  - Website login, customer support, access to other Blackbaud products, training, community
- It’s a new paradigm of software release
  - RE NXT is released and being used (since June 2015, 2,000+),
  - While it’s still being built (weekly to biweekly updates),
  - And while we continue to use RE 7, the “database view”
- There’s no conversion, now or later
- Open, web-based, REST API
- New contract model with Blackbaud
The Web View
The Web View
Blackbaud SKY Reporting

*Built specifically to help nonprofit directors discover opportunities via dashboards, share knowledge with one-click access to pertinent information and act on information with self-service lists and smart segmentation to drive results...*

*Execute on tactics proven to reach fundraising goals.*

*Never let a lapsing donor go unnoticed.*

*Ensure your revenue is always trending upward.*
To See More

1. www.theNXTera.com
   - Webinars

2. Two roadshows left this year (Canada)
   www.theNXTroadshow2016.splashthat.com

3. Your Blackbaud account executive

(And do not worry about RE 7…Blackbaud will continue to support it for many years to come. RE NXT is an exciting opportunity, not a requirement.)
Raiser’s Edge 7
Client – Local Server

Raiser’s Edge On-Premises Today
Raiser’s Edge 7 Moves to Hosting
Current Customers:
Raiser’s Edge Moves to Hosting

Raiser’s Edge 7
Hosted

Citrix

RE7 DB
Raiser’s Edge NXT

“Database” View
power of
The Raiser’s Edge

“NXT Web” View
flexible, smart &
built for the future

Built for the Cloud

Citrix

blackbaud
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Raiser’s Edge NXT

“Database” View
- Data Entry
- Fundraising
- Executive Reporting
- Events & Marketing
- Membership
- Volunteer

“NXT Web” View

Citrix
Raiser’s Edge NXT

“Database” View
Familiar processes
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blackbaud #bbcon
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- Data entry
## Subscription Packages

### Cloud Access
- Web and Mobile Access
- Unlimited Users
- Training Videos and Chat Support

### Fundraising & Supporter Management
- Email and Online Fundraising
- Crowd Fundraising
- Recurring Gifts (EFT) and Payment Processing
- Tribute and Memorial Gifts
- Planned Giving
- Prospect Research
- Events
- Membership
- Volunteer
- Alumni

### Data Enrichment & Analytics
- Address Updates and Wealth Ratings
- Email and Phone Appends
- Suggested Major Donors & Ask Amounts
- ResearchPoint™: Prospect Research Screening
Why RE NXT
What It Means for You and Me
So what does Raiser’s Edge NXT mean for you and me?

10. We have something new and exciting!
9. Anywhere, any time…
8. State of the art design and technology 

... Any device
So what does Raiser’s Edge NXT mean for you and me?

7. The Blackbaud API and Partner Marketplace
So what does Raiser’s Edge NXT mean for you and me?

6. Better integration (and lots of it) with the Blackbaud family of products and services
5. Easier conversion and implementation
4. Cloud-based convenience and functionality

3. Unlimited users
   No more paying by the seat…
So what does Raiser’s Edge NXT mean for you and me?

2. Prescriptive nature
So what does Raiser’s Edge NXT mean for you and me?

1. Role focus starting with fundraisers
How to Move to RE NXT
What to Do, What Not to Worry About
Getting ready for NXT…

WHAT YOU NEED TO WORK ON
- Consider Blackbaud Hosting
- Spread the word
- Talk with your account executive about the best package for your organization

WHAT YOU DON’T NEED TO WORRY ABOUT
- Should I delete constituent records?
- What about getting the data ready?
- How much work is the implementation?
Let’s talk about Hosting…

Already on Blackbaud Hosting? You’re all set!*

Do you have integrations or processes that might have issues with Hosting?

**THIS DOES APPLY TO**
- Financial Edge integrations
- Third-party products
- Any work directly off the backend SQL Server tables

**THIS DOES NOT APPLY TO**
- Crystal Reports – fully supported
- Exporting and importing – fully supported
- Printing – fully supported
- Blackbaud online integrations – fully supported
Media
Spread the word

SHARE THE ENTHUSIASM
  • Pick the 3 things your team would be most excited about!
Selecting your package

*NXT comes with significantly more than Raiser’s Edge 7 maintenance*

- Hosting
- Unlimited users
- More modules
- Online Express
- Data enrichment services and analytics
- NXT web view

*Remember, you’re replacing your maintenance, not adding to it.*
Selecting your package

Compare that to what you’re paying now:

• Blackbaud Hosting, Blackbaud analytics, Blackbaud data enrichment services, Blackbaud online tools
• Replaces Wealth Engine, Constant Contact, Network for Good, etc.
• No Server or related IT expenses
Should I delete constituents?

_Probably not._

Let’s not replace one bad habit with another.

_Instead of deleting inactive records:_

Run the duplicate report.

Remember, the count is _possible_ duplicates, _not necessarily actual_ duplicates…
Does the number of possible records found justify the potential effort and risk?
Analysis of a database with 160,000 records

- 49,586 records with no hard credit gift activity
- 45,099 of those have no actions
- 44,804 of those have no linked event record
- 44,500 of those have no volunteer assignment
- 21,002 of those have no volunteer time sheet
- (which means that 23,498 of these folks do have a volunteer time sheet)
- 20,999 have no proposal
- 17,559 have no individual relationships
- 6,735 have no org relationships
- 5,365 have no soft credit gifts
- 3,437 have no notes

See the home page of Bill’s website at www.billconnors.com for a whitepaper on this topic
DATA PREPARATION

WHAT DO I HAVE TO DO TO GET MY DATABASE READY?

For Fundraisers (Solicitors) who will want to use the Work Center function of NXT: link constituent records to user accounts in RE 7 Security.

- If you’ve not yet gone to 7.94/7.95/7.96, grab screenshots of your pivot reports.
- If you’re on EE, see KB article 96538.

That’s it!
IMPLEMENTATION

MOVE TO HOSTING

1. Send Blackbaud a backup
2. Upgrade to 7.96
3. Install Citrix client
4. Set up Hosting accounts
5. Train users
6. Set up Crystal Reports and user options
IMPLEMENTATION

NXT WEB VIEW SETUP

Action statuses
Prospect statuses
Opportunity statuses
Revenue settings
IMPLEMENTATION

NXT WEB VIEW SETUP

Security groups

HINT: Save as!

May require refining your RE security groups
IMPLEMENTATION

NXT WEB VIEW SETUP: USERS

- Google accounts or email?
- 10 seconds per user to invite to NXT
TOPICS

- Database and NXT web views
- Work Center, filtering
- Analyze, including Revenue settings
- Lists
- Portfolios
- Tags, including definitions
- Searching
- Constituents
- Tiles
- Renamed items
- Adding and editing constituents, actions, notes and opportunities
- Ratings
- Prospect and Opportunity Statuses
- Attachments
- Reminder of browser capabilities

IMPLEMENTATION

NXT WEB VIEW SETUP: USERS

- Tell users invitation email is coming so they know it’s legitimate and respond
- Host a 1 to 2-hour walk-through with them
And that’s it…

No extensive training and no software to install for NXT Web View users.

**Over time you’ll be able to:**

- Clean up fundraiser assignments and portfolios
- Set fundraiser, campaign, fund and appeal goals
- Clean up code tables that NXT web view users will be using most (e.g., Action and Note Types)
- Clean up policies and procedures regarding Fundraisers, Actions, Notes and Opportunities
But these are things we should all be doing anyway…

Being in NXT will help you get buy-in from your users to make real progress.

Be sure to join the Blackbaud Support and RE NXT Communities to monitor continuing additions.
That’s it. Easy, right?

Evaluate Hosting

Present new features

Work with your Blackbaud Account Executive
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<th>Venue</th>
<th>Date</th>
</tr>
</thead>
<tbody>
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<td>Toronto</td>
<td>St. Andrew’s Club</td>
<td>Thursday, November 16</td>
</tr>
<tr>
<td>Vancouver</td>
<td>Simon Fraser University</td>
<td>Tuesday, December 6</td>
</tr>
</tbody>
</table>

Register here: [www.theNXTroadshow2016.splashthat.com](http://www.theNXTroadshow2016.splashthat.com)
Q&A and Contact Info

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Did we leave you inspired, wired, or fired up?

Tell us in a session survey on the mobile app, and you’ll be entered to win a complimentary pass to bbcon 2017 in Baltimore!