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| **Course Name:** **Constituent Management** | **Course Description:** This half-day session teaches people to add and update constituent records. |
| **Audience:** All users who have security rights to add or update constituent records in BBCRM | **Prerequisites:** Navigation and System Overview or equivalent knowledge |
| **Session Timing:** 3-4hours | Delivery: Webinar/Video |
| **Lead Developer:** Michelle Schoen | **Assigned SMEs:** |

Learning Objectives

After completing this course, learners will be able to:

* Understand the purpose of managing constituents in CRM
* Recognize the various types of constituents in CRM (review)
* Understand how constituent information gets into BBCRM
* Locate and view affiliate information
* Follow best practices to search for constituent records (review)
* Add individual constituent record
* Understand household relationships
* Navigate the tabs and tasks of an individual record
* Understand name formats
* Add a household record
* Add an individual to a household
* Add an organization
* Add an organization hierarchy structure with subsidiaries
* Add a group record
* Add and remove members of a group
* Add and remove group member roles
* Manage group member role
* Understand the difference between a group and a committee (review)
* Add and edit a committee
* Add members/roles to a committee
* Update contact information
* Add and edit a notification
* View the notification pop up display
* Add/edit personal Information
* Identify and establish relationships between constituents
* Manage mail preferences and solicit codes
* Add a constituency
* Add a constituent attribute
* Decease and deactivate an individual
* Update records for marriage or divorce

**Note:** These objective are included, where they are covered, in the first column of the design outline below.

| Section/Learning Objectives | Time | Topics | Methods, Resources and Requirements |
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| **Getting Started**  *Introduce the instructor and the participants and set the stage for the session.* | 5 | * Introductions * Session Agenda * Training housekeeping   + Schedule   + Breaks   + Parking lot for unanswered questions | Methods:   * Lecture * Discussion   Resources and Requirements:   * Slides * Session agenda * White board or flip chart for Parking Lot |
| Constituent Management Overview   * Understand the purpose of managing constituents in CRM * Recognize the various types of constituents in CRM (review) * Understand how constituent information gets into BBCRM * Locate and view affiliate information * Follow best practices to search for constituent records (review) | 20 | * Explain the purpose of constituent management—why it is important * Review constituent types (covered originally in the *Navigation/System Overview* session)   + Individual   + Household   + Organization   + Groups/Committees * Overview of how constituent information gets into BBCRM   + Individual (one off)   + Batch Entry   + Import   + Integration * Overview of affiliate information   + How affiliate records get into BBCRM (maintained in SFDC)   + Where to locate affiliate records * Review search best practices   + Use city, state, zip code, etc.   + Broaden search if information not found   + Always search to see if a record | Methods:   * Lecture * Discussion   Resources and Requirements:   * Slides * JumpStart Documentation * Reference: Core Principles Design Document * Workflows (for reference only)   + Constituent Batch Entry   + Importing Constituents   + Luminate Online Integration * SME in room to answer questions   **Note:** Best practices and business rules will be presented and reinforced throughout the session where applicable. SMEs attending the session can add additional insight and guidance. |
| **Add an Individual Constituent Record**   * Add individual constituent record * Understand household relationships | 15 | * Add an individual constituent record   + Screens and tabs   + Required fields * Discuss household relationships | Methods:   * Lecture * Demonstration   Resources and Requirements   * Slides * Training environment * Workflow: Add/Edit Individuals * SME in room to answer questions |
| **The Individual Record**   * Navigate the tabs and tasks of an individual record * Understand name formats | 15 | * Demonstrate the tabs and tasks of an individual record   + Summary tiles   + Tabs and sub-tabs * Describe name formats | Methods:   * Lecture * Demonstration   Resources and Requirements   * Slides * JumpStart Documentation * Training environment * SME in room to answer questions |
| **Add a Household Record**   * Add a household record * Add an individual to a household | 15 | * Review characteristics of a household record and household relationships * Add a household record   + Screens   + Required fields   + Applicable HFHI business rules * Add an individual to a household | Methods:   * Lecture * Demonstration   Resources and Requirements   * Slides * Training environment * Workflow: Add/Edit Households * SME in room to answer questions |
| **Practice Activity: Individual and Household Record**   * Reinforce previous two topics with hands on practice activity. | 20 | * Practicing adding records   + Add an individual constituent record   + Add a Household record and then add an individual to the household | Methods:   * Practice Activity   Resources and Requirements   * Slide with activity instructions * Training environment * SME to assist and answer questions |
| **Add an Organization**   * Add an organization * Add an organization hierarchy structure with subsidiaries | 15 | * Review characteristics of an organization and organization relationships * Add an organization   + Screens and tabs   + Required fields * Add an organization hierarchy structure with subsidiaries   + Screens and tabs   + Required fields | Methods:   * Lecture * Demonstration * Practice Activity   Resources and Requirements   * Slides * Training environment * Workflow:   + Add/Edit Organizations   + Organization Mergers and Acquisitions * SME in room to answer questions |
| **Add and Edit a Group Record**   * Add a group record * Add and remove members of a group * Add and remove group member roles * Manage group member role | 15 | * Review purpose of group records * Add a group record   + Screens and tabs   + Required fields   + Applicable HFHI business rules * Add and remove members of a groups * Add and remove member roles * Manage group member roles | Methods:   * Lecture * Demonstration * Practice Activity   Resources and Requirements   * Slides * Training environment * Workflows: Add/Edit Groups * SME in room to answer questions |
| **Add and Edit a Committee Record**   * Understand the difference between a group and a committee (review) * Add and edit a committee * Add members/roles to a committee | 15 | * Review difference between group and committee * Add a committee record   + Screens   + Required fields * Add members/roles to a committee * Describe business rules | Methods:   * Lecture * Demonstration   Resources and Requirements   * Slides * Training environment * Workflow: Add/Edit Committees * SME in room to answer questions |
| **Practice Activity: Add/Edit Organization, committee, and group records**   * Reinforce previous two topics with hands on practice activity. | 30 | * Practicing adding records   + Individual   + Household | Methods:   * Practice Activity   Resources and Requirements   * Slide with activity instructions * Training environment * SME to assist and answer questions |
| **Manage Constituent Information**   * Update contact information * Add and edit a notification * View the notification pop up display * Add/edit personal Information * Identify and establish relationships between constituents * Manage mail preferences and solicit codes * Add a constituency * Add a constituent attribute * Decease and deactivate an individual * Update records for marriage or divorce | 30 | * Update contact information   + Screens and tabs   + The “do not” check box   + Filters for viewing inactive information * Notifications   + Add a notification   + Edit a notification   + View notification pop up   + End a notification * Add/edit personal information   + Screens and tabs   + Best practices/business rules * Identify/establish relationships   + Screens and tabs   + Best practices/business rules * Manage mail preferences and solicit codes   + Screens and tabs   + Best practices/business rules * Add/edit a constituency   + Screens and tabs   + Best practices/business rules * Add/edit a constituent attribute   + Screens and tabs   + Best practices/business rules * Decease/deactivate an individual   + Steps to take when a member of a household * Updating for marriage or divorce   + Marrying constituents   + Divorce and separation | Methods:   * Lecture * Demonstration   Resources and Requirements   * Slides * Workflows:   + Contact Information Update   + Add/Update Relationships   + Deceased Constituents   + Marrying Constituents   + Divorce and Separation * Training environment * SME in the room to answer questions |
| **Practice Activity: Manage Constituent Information**   * Reinforce previous topic with hands on practice activity. | 30 | * Practicing managing constituent records   + Choose exercises from the topics above. | Methods:   * Practice Activity   Resources and Requirements   * Slide with activity instructions * Training environment * SME to assist and answer questions |
| **Assessment**  *10 questions to allow learners to demonstrate their understanding of these topics. Learners must get 80% or better to receive their log in credentials and continue to the next module.* | 15 | * Questions will be multiple choice/single answer, multiple choice/multiple answer, and true or false. * There will be at least one question from each section. | Methods:   * Assessment * Participants grade their neighbor’s quizzes (?)   Resources and Requirements   * Paper and pencil quiz |
| **Total Session Time** | 240 |  |  |