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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
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| **Total Session Time** | 240 |  |  |