CRM User Forum

July 16, 2025

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Objectives

- What is a CRM
- Why is a CRM important
- How does Scouting America use CRM
- Question/Answers

C R M

- Constituent Relationship Management
  - a technology and strategy used by businesses to manage and analyze customer interactions throughout the customer lifecycle. A CRM system helps businesses track interactions, manage customer data, and personalize communication.
- Manage Constituents
  - Constituent can be a person, organization, group, or family
  - Personal information
    - Life events
  - Relationships
  - Interactions
  - Events
  - Communications
  - Contributions

Constituent Relationship Manager

- In "for profit" world this is a sales tracking tool, and it would be customer-based
- We are wanting to know as much possible information about our Constituents
- Who are the constituents we want to manage?
  - Volunteers
  - Parents
  - Donors
  - Employees

Constituent Personal Information

- Name, address, phone
- Multiple addresses – seasonal, second home, etc
- Email addresses
- Preferred contact information
- Social media accounts
- Interests – hobbies
- Name format
- Alternate lookup IDs
- Awards – Eagle, Silver Beaver, Training awards, etc

Constituent Relationships

- Spouse

- Parent

- Siblings

- Other Relatives

- Employee – relationship with organization

- Member – Groups – Committees

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Constituent Interactions

- Documentation – legal papers, wills, trusts, other
- Donor communications
- Grant agreement
- Meeting notes
- Type of contact – email, event, meeting, call, social media
- Date of contact

Constituent Events

- Sports fundraisers – golf, sporting clays, etc
- Fundraising dinners – GALA, Distinguished Person events
- Recognition dinners
- Track information related to the event
  - Event tasks
  - Expenses
  - Registrants – different types
  - Donors – cash or other – auction, tickets, etc.

Constituent Communications

- Acknowledgements (thank you)

- Payment reminders

- Receipts

- Donor acquisition documents (pledge cards)

- Letters

- Other marketing materials

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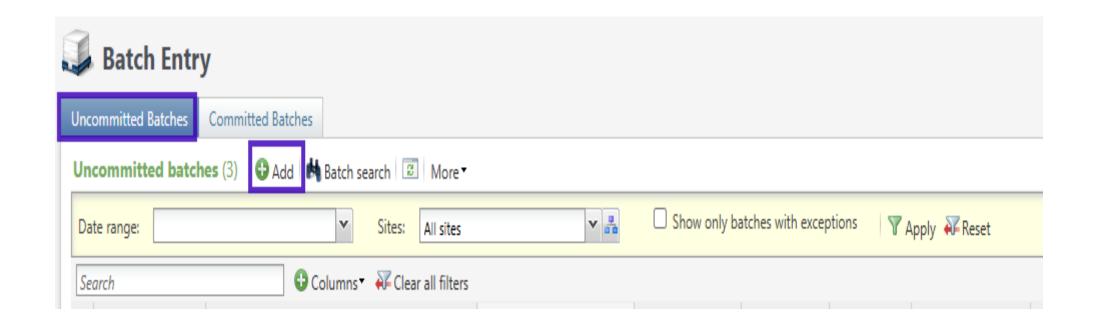
Constituent Donations

- Track donor revenue or contributions
  - In the BSA, we use "appeals" to track types of contributions
- Track donor intent to give – pledges
- Feed donor information to General Ledger (PeopleSoft)
  - To send information to GL, we use a process called "Batch Entry"
  - Group transactions of different types to send to GL

BATCH ENTRY – REVIEW OF TYPES

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Committed Vs. Uncommitted Batches

- Uncommitted
  - Filled out but not recorded
  - All batches start as uncommitted
- Committed
  - After steps are completed, commit a batch
  - The batch has been entered and recorded

Batch Entry

Add a Batch

Revenue Batch Templates

- LC Cash/Check Payment Donation
- LC Credit Card Payment Donation
- LC Gift-in-kind & Service Contribution
- LC Pledge Commitment
- LC Pledge Commitment with Credit Card
- LC Pledge Payment Cash/Check
- LC Pledge Payment Credit Card
- LC Recurring Gift Commitment (monthly or other schedule)
- LC Stock & Securities Received

Constituent Reports

- Reports for before a contribution is made
  - Constituent listing (prospect list)
  - Appeal donor list
  - Constituent segmentation – do they have a natural affiliation
- Reports for after a contribution is made
  - Lifetime giving
  - Appeal tracking by gift type, donor location, solicitor type

Constituent Reports

- Stock Reports

- Queries

- Data Lists

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Master ID

Master ID

- A new ID that is used to link one or more constituent records together
  - By assigning a common Master ID value to each constituent record in the group of linked records
- A matching algorithm that searches for "duplicates" and "multiples"
  - Duplicates: 2+ records for the same person within a council
  - Multiples: 2+ records for the same person across councils
- Identification of a preferred record in a group of linked records
- An enhanced constituent search with a Master ID mode
  - Only returns the preferred record from a group of linked records
- Consolidated views of information across a linked set of records

Duplicates and Multiples

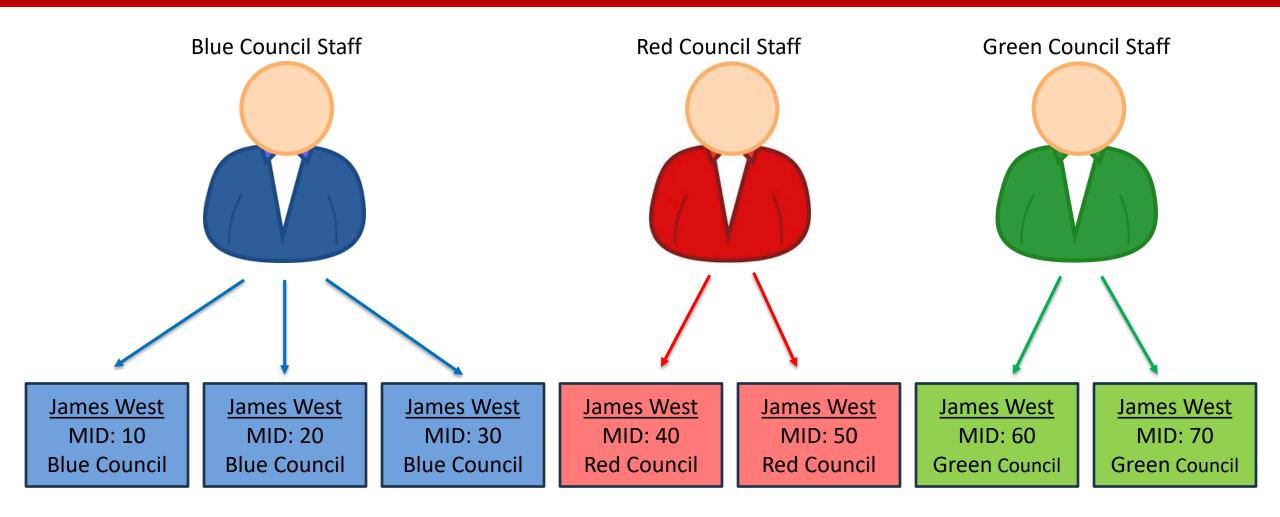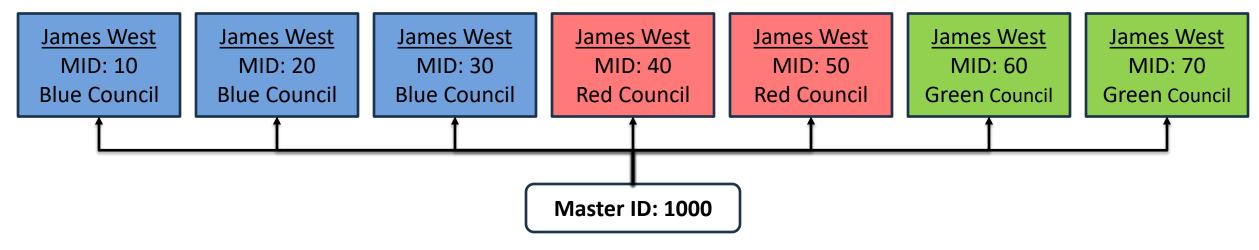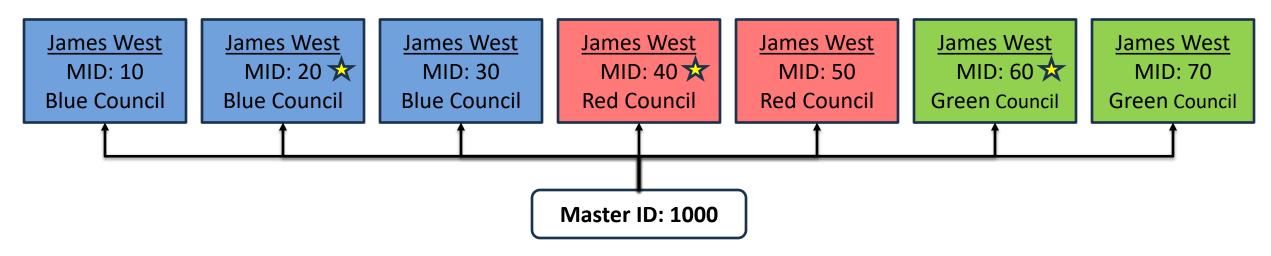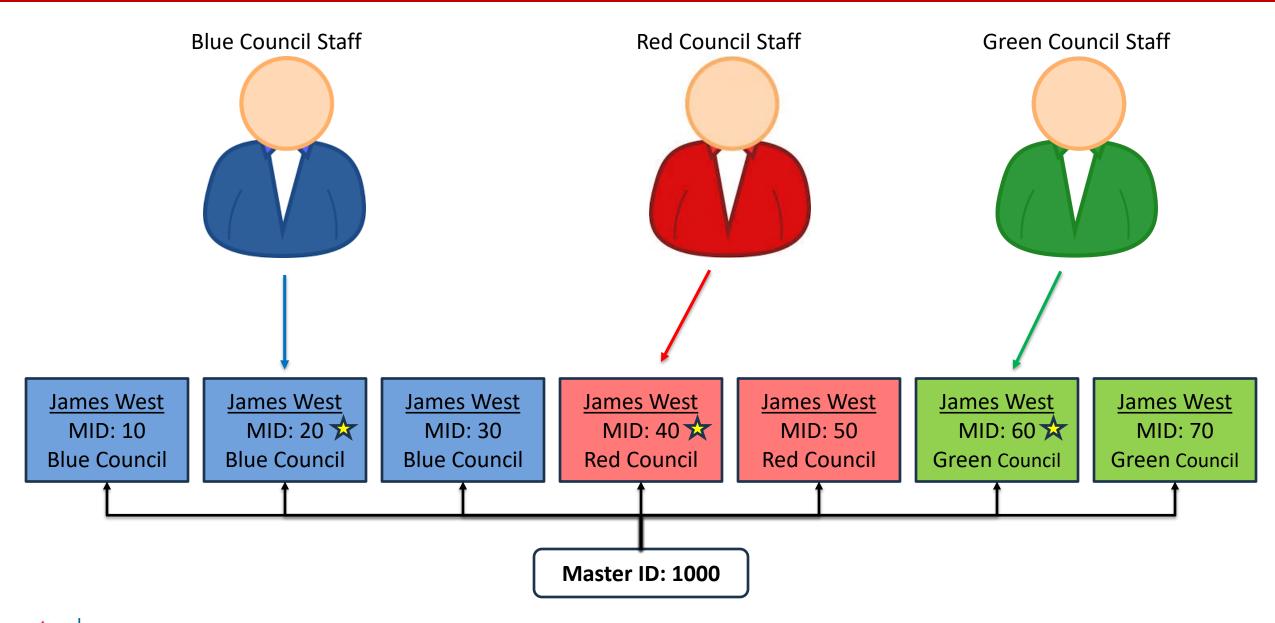| James West
MID: 10
Blue Council | James West
MID: 20
Blue Council | James West
MID: 30
Blue Council | James West
MID: 40
Red Council | James West
MID: 50
Red Council | James West
MID: 60
Green Council | James West
MID: 70
Green Council |

Current Constituent Search
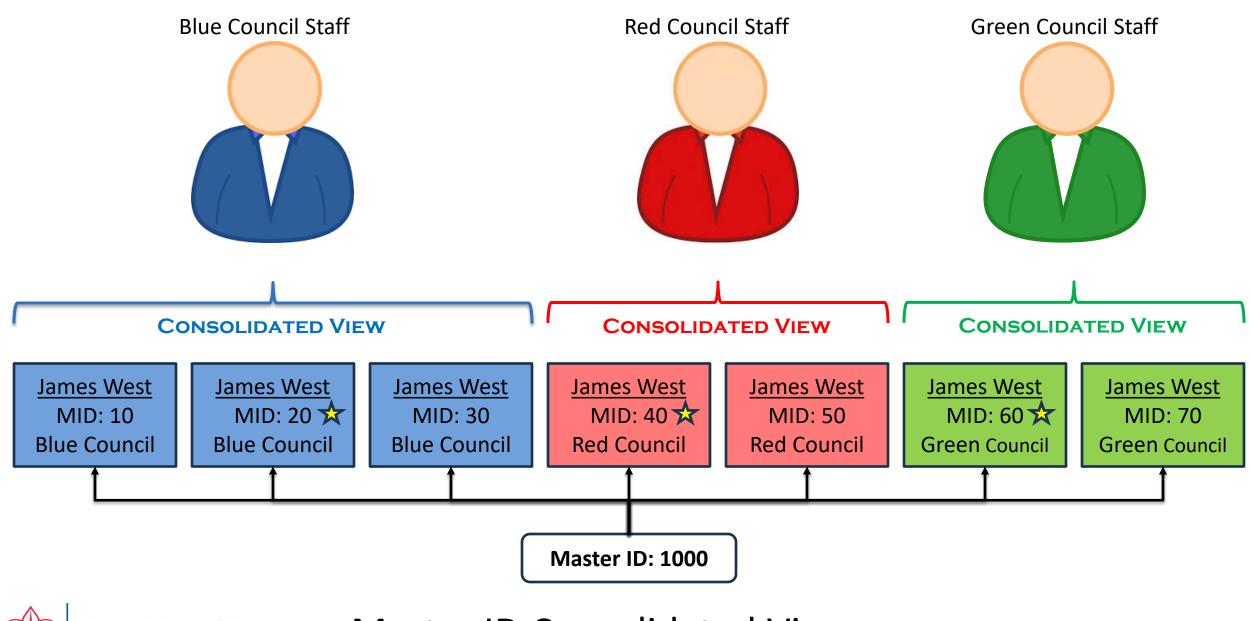
Master ID Preferred Records
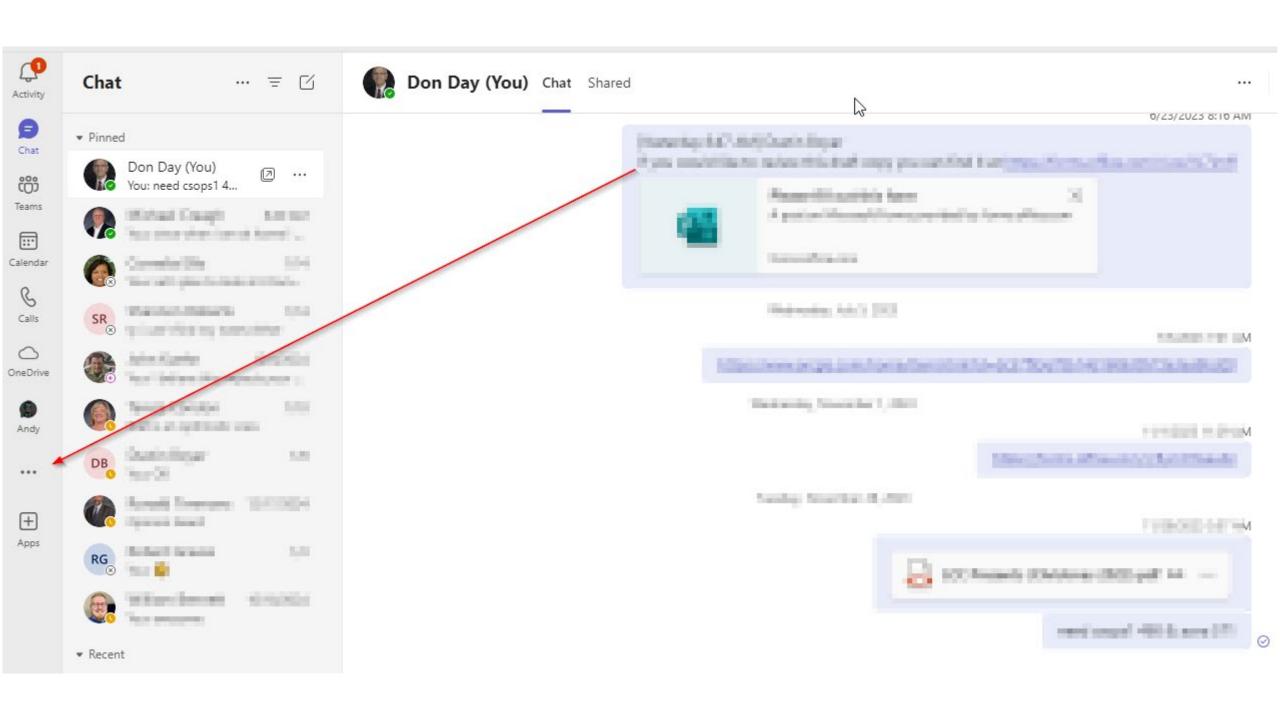
Master ID Constituent Search

Master ID Consolidated Views
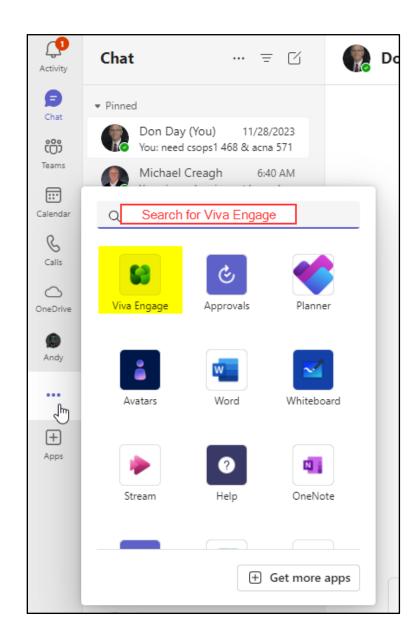
Master ID Status
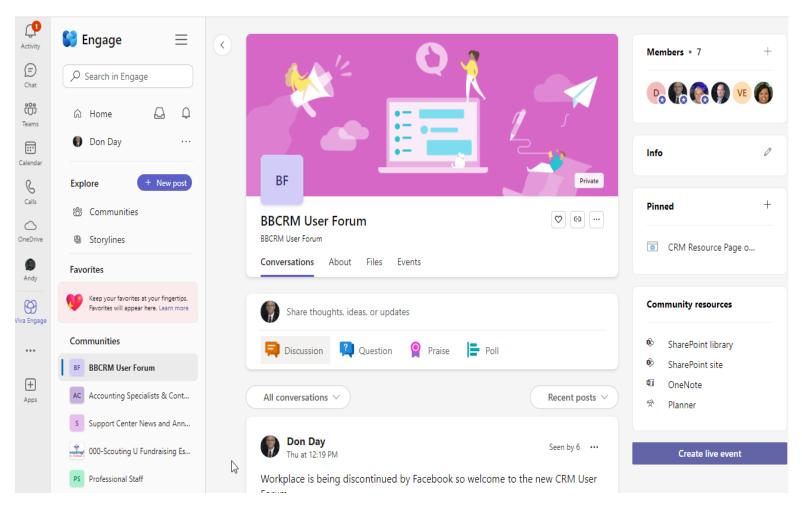
- Initial Release of Master ID functionality ready for release
- Additional work being done to ensure adequate communication, training, and job aids accompany the release

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Viva Engage on Teams

- Workplace is gone. Facebook will no longer support it mid-year
- CRM User Forum moved to Viva Engage on February 3
- Viva Engage is part of Microsoft Teams
  - Access via Teams
  - Access via web at https://engage.cloud.microsoft/

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Council Support

Council Management Support

    Contact Council Management Support

    Council Assessments

    Council Board Resources

    Council Business Practices

    Council Fiscal Management and Training

    Journey to Excellence

Council Funding and Finance

    Financial Planning

    Funding The Council

Council Administration

    Local Council Financial Audits

    Back Office Business Solutions

Council Administration

The sections below provide tools for Council staff to assist them in the proper management of their Council. This is designed for staff use but may provide detailed information to volunteers interested in the particular topics.

Accountable Plan Template
Council Office Procedures
Council Stewardship Policies
FASB Accounting Changes and the BSA – new for 2018
Fiscal Management Procedures for Stewardship
Fiscal Policies and Procedures for BSA Units – Revised April 2022
  – – **BSA Units PayPal and Venmo Reporting Update**
Interpreting Financial Statements
Life Insurance Imputed Calculation
Local Council Accounting Manual
Local Council Financial Audit Tools
New York Conflict of Interest Policy—Updated March 2014
New York Conflict of Interest Policy—March 2014
Records Retention Policy– Updated January 2019
Presentation: **Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance** – Uploaded April 2014
Record Camp Card Transactions—PeopleSoft
Record Product Sales in General Ledger
Time Study Forms

Blackbaud CRM Resources

BSA Fiscals Forum

PeopleSoft Support

   • **Accounts Payable**

www.scouting.org/financeimpact

CRM Resources

COUNCIL SUPPORT

Council Management Support   ⌄

Council Funding and Finance   ⌄

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

Report Cookbook (for OLTP) Scouting America Appeal Progress & Appeal Constituent Reports

2025

January 2025 User Forum – Slide Deck – recording
– Year-End 2024 Tasks – 2025 New Year Tasks – Contribution Statements
February 2025 User Forum – Slide Deck – recording
– Potential batch changes – Closing Out 2024
March 2025 User Forum – Slide Deck – recording
April 2025 User Forum – Slide Deck – recording
– Master ID – IRS 990 – Updating Appeals & Special Events – Viva Engage

Member Care

- Call 972-580-2489
- http://membercare.scouting.org or
- http://supportcenter.scouting.org

- Create a work order directly in JIRA

Welcome to the National IT Service Catalog

We value your feedback. Click Here

My Open Tickets | My Closed Tickets | Knowledge Base | Report Security Issue | Report Phishing Attempt | Password Reset | Office365

HR Gateway | MyBSA | Member Care Contact Center Calendar | National Directory

News and Announcements

| 10/1/2024, 4:25:22 PM | National and Council |

Mandatory Cybersecurity Training

Please be on the lookout for an email from Scouting University regarding Cybersecurity training. Click this announcement for more details.

| 10/1/2024, 3:19:06 PM | National and Council |

IT Online Service Catalog

I am a National Employee

I am a Council Employee

Service Categories

Accounts & Passwords

BSA Applications (Business Operations)

BSA Applications (Scouting Programs)

Email, Communication & Collaboration

Network Services

Security Services

Hardware & Software

Welcome to the National Online Support Center Service Catalog.

This service catalog is a detailed list of services provided by the Information Services Group.

Each service will have the following information:

- A brief description
- How to request support
- Links to additional knowledge or training
- Highlighted Frequently Asked Questions

To go directly to the knowledge base, click here.

If there is something we can do to make this service catalog better, please let us know; click here.

All Council Services

Service Categories

Accounts & Passwords

BSA Applications (Business Operations)

BSA Applications (Scouting Programs)

Email, Communication & Collaboration

Network Services

Blackbaud
Blackbaud CRM is a cloud based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of

BSA Digital Assets
Access to BSA Digital Assets.

Criminal Background Check
Sterling provides Criminal Background Checking (CBC) for Adult Volunteer Registrants and CBC-Required Positions.

E-Invoices
E-Invoices is an online platform for collecting Supply Invoices.

MyBSA
Internal employee resource portal for both national and council staff.

National Support Center
Ticketing and knowledge base systems used by the National Support Center to provide technical support.

Payment Processor
Stripe, WePay, and the BSA Payment Platform serve as the payment

Payroll
ADP is the provider for BSA Local Council payrolls. Check here if you

PeopleSoft Financials
Peoplesoft is the financial application used by councils for fiscals and human

Overview

Blackbaud CRM is a cloud-based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of fundraising activities. It can be accessed via the following link: Blackbaud CRM

Request Support

- **Open A Request** - To add a current employee as a user within Blackbaud.
- **Open A Request** - If adding a new employee, Blackbaud access can be requested during this process.
- **Open A Request** - To report a problem or request troubleshooting in Blackbaud.

1. Description * 🔲

A brief description of your problem.

Enter your answer

2. Application * 🔲

If you are needing assistance with an application, please enter application below (Example: Blackbaud, Peoplesoft, Membership, Adobe, etc.) (optional)

Enter your answer

3. Attachment(s) (Non-anonymous questionⓘ) 🔲

(optional)

⬆ Upload file

File number limit: 10   Single file size limit: 10MB   Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

Submit

Next Forum

August 20, 2025
10:00 am & 2:00 pm CST

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Questions & Answers

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