

Allegiance University

Fundraising Training Event 2010

Get your first look at our upcoming software release of Allegiance Fundraising V8.6.

Each participant will be provided with a PC loaded with their own station's data for hands-on application and practice of the skills being taught.

Register for single or multiple days depending on your specific needs.

LEARN HOW TO

- ✓ Work smarter, not harder. Let your data tell you what's working and what's not
- ✓ Get better on-air drive results with less stress. Proper set-up before the drive is the key
- ✓ Use what you know about your donor to get them to give more
- ✓ Look smarter to your donors by keeping your data clean
- ✓ Stay in *better* touch with your donors while spending *less* money
- ✓ Generate more revenue using fewer resources using new functions more effectively

WHO SHOULD ATTEND

- ✓ Membership and donor management staff who want to learn the best techniques for database management
- ✓ Business office staff who want to effectively analyze donor data and make financial operating decisions
- ✓ New staff who want to learn the Fundraising System for the first time
- ✓ Experienced staff interested in progressing their knowledge to the next level

WORKSHOP AGENDA

AGENDA AT A GLANCE		
SESSION 1	MONDAY	DATA ENTRY, END OF DAY PROCESSING, CREDIT CARD INTERFACE
SESSION 2	TUESDAY	NEW QUICK QUERY SEGMENTATION, NEW DOWNLOAD MEDIA, FUNCTIONS, SUBSCRIPTION LISTS, TARGETED SOLICITATIONS
SESSION 3	WEDNESDAY	MANAGEMENT AND ANALYSIS REPORTS
SESSION 4	THURSDAY	MODULES ELECTRONIC DATA TRANSMISSION, KIDS CLUB, ADDRESS AUTOMATION, MOVE AGENT FOR NCOA, APPENDED DATA, MATCHING GIFTS, DAY SPONSOR, EXPANDED PREMIUM, GOLD KEY SERVICE
SESSION 5	FRIDAY	WEB MODULE INCLUDING EMAIL MANAGEMENT

MONDAY - DATA ENTRY, END OF DAY PROCESSING, CREDIT CARD INTERFACE

Learn everything you need to know about data entry plus new features for defining non-taxable donations.

Learn how to:

- create, update and maintain individual and account records
- create, manage and utilize subscription lists
- store biographical information and multiple addresses, phone numbers and email addresses
- use partial shipments for premiums
- use break tables for multiple stations
- create pledges and apply payments
- merge duplicate records for database efficiency
- run End of Day Processing with ease

TUESDAY - NEW QUICK QUERY SEGMENTATION, NEW DOWNLOAD MEDIA, FUNCTIONS, SUBSCRIPTION LISTS, TARGETED SOLICITATIONS

Learn how to use the new V8.6 controls and "Quick Query" to create lists and new download media with a built-in preview. Using your own database, you will use our "real-life" examples to practice what you've learned. If you have ever struggled to pull data from your database, this class is for you.

Learn how to:

- create and use subscription lists for special interest contact and e-communications
- do complex segmentation and generate lists with new Quick Query
- decide which function to use
- use the new download media
- select fields when creating segmentation

WEDNESDAY - MANAGEMENT AND ANALYSIS REPORTS

Use your own database to learn how to generate statistical reports to help you make better decisions. Benefit from the new features now available.

Learn how to:

- identify which report to run and how to run it
- lock reports to prevent deletion
- use report results for analysis to make better fundraising decisions
- download and save your results for historic purposes
- convert your report data into charts and graphs

THURSDAY - MODULES

In this session you will learn how to use the Electronic Data Transmission (EDT), Kids Club, Address Automation, Move Agent, Appended Data, Matching Gifts, Day Sponsor, Expanded Premium and Gold Key Service Modules.

Learn how to:

- run monthly credit card and EFT charges using the PayPal (formerly VeriSign) and Sage Payment Solution integrations
- use Allegiance tools to help you become PCI Compliant
- comply with new USPS move update regulations using the Move Agent for National Change of Address (NCOA)
- locate accounts with a specific premium item
- optimize customer satisfaction using the Gold Key Service Module

FRIDAY – WEB MODULE

In this session you'll learn how to set up pages and tables for on-air drives and online fundraising as well as how to raise more revenue using fundraising best practices in all of your e-communications.

Learn how to:

- set up premiums, goals and challenges for on-air drives
- create web pledge pages and volunteer pledge-entry pages
- create e-renewals and confirmation pages
- create and send polished HTML e-newsletters
- find out who is opening your emails and who is clicking on each link
- manage email addresses, bounced emails, subscription lists and opt-outs
- create online forms that auto-fill the contact fields

General Info

Dates

May 17-21, 2010

September 13-17, 2010

Cost

\$375 for the first day

\$325/day each additional day

Be sure to use your annual training credit.

Call us at 800-858-7654 to get your credit balance.

Lunch is included.

Sessions run 9:00 am to 4:30 pm.

Registration

Register [online](#) or call us at 800-858-7654

Registration Deadlines: May 1 and September 1

Location

Allegiance Corporate Training Room

3064 49th Street South

Fargo, ND 58104

Daily transportation is available upon request.

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