TRISH BORDEAUX – ROOM 1

Setting Up e-Pledge for Your Public Website – Web Notes & Options

e-Pledge set up involves hundreds of web notes and web options. We will discuss how web notes and web options work and learn about the most important settings. This is for anyone who is preparing to set up (or wants more information on) Andar's e-Pledge feature for Individual (non-Workplace) Donors.

Setting Up e-Pledge for a Workplace Campaign – Web Notes & Options

e-Pledge set up involves hundreds of web notes and web options. We will discuss how web notes and web options work and learn about the most important settings. This is for anyone who is preparing to set up (or wants more information on) Andar's e-Pledge feature for Workplace Campaigns.

MIG – General Features

We all have heard how MIG is not just enhancements to the major gift features of Andar. It's that and much more. This session will provide an overview of the 'much more'. We'll look at features such as enhanced Do Not Contact capability, handling deceased individuals, pledge alerts, enhanced custom bio tabs and dashboards, gift relationship, special campaigns, and thank you letter codes and more. This is for anyone who has (or is considering) MIG

Subscriptions, Mass e-Mails and e-Mail Tracking

If you own any Andar web module you have the capability to manage subscriptions in Andar, allowing people to subscribe and unsubscribe to these e-mails. This session look at how to manage these subscriptions, how to use the new HTML editor for creating newsletters and more. This is for anyone interested in managing newsletter subscriptions/e-mails in Andar.

Setting Up Andar Surveys

If you own any Andar web module you have the capability to do online surveys. If you currently use paper or electronic forms internally you can do them directly in Andar. This session will look at how to create a survey, e-mail a link to the survey, and have your target population complete the survey. We will also look at how to run survey analysis reports.

e-Pledge Best Practices

Discuss with your peers some of the best practices regarding the set up of e-Pledge. Ask your questions. Share your opinions. For those that are using, or are interested, in e-Pledge.

e-Community Online Campaign Management

If you own any Andar web module you have the ability to allow your campaign volunteers to go to a website and monitor the status of their accounts. This session will look at how to create the website and provide those volunteers with this capability.

Andar Standards & Protocols

In this session we will discuss the importance of accurate and reliable data. Having organization-wide Standards and Protocols are the key. We will look at where to start with data clean up implementation, how to maintain quality control, suggested Standards and more. For System Administrators, Power Users, Data Managers, anyone interested in CRM.

MIG – Prospects, Plans, Communications and Surveys

This session will look at the basics of managing prospects, plans, communications and surveys and how, with MIG, these features can work together creating a seamless moves management/information management situation in Andar. Participants should be somewhat familiar with prospects, plans, communications and surveys. For anyone who has (or is interested in) MIG.

Communications Log & Outlook Connector

In this session we will discuss how to determine what subject codes to use, how each department works together, how to ensure what is brought into Andar is truly only what is needed. We will also look at how Outlook Connector can automatically create communication records from sent or received e-mails.

Event Management

Are you challenged with the need to manage attendance to meetings and/or trainings, fundraising events or events like annual meeting? This session will look at how to manage event invitations/attendance, payment, and more. For anyone who manages event attendance/payments, committee meetings or training sessions.

CHRIS SMYTH – ROOM 3

RD - Introduction to Campaign

Beginning at the Dashboard, this session will plot a course through the Campaign Structure via Account Managers in order to reach the wealth of Resource Development data available on an Account Profile.

RD - Campaign Goals & Projections

The primary focus of this session will be on the methods available for setting and maintaining Goals and Projections.

RD - Campaign Reporting (Part 1)

This session is an introduction to accessing campaign results in ANDAR. Topics include: Dashboard Items, Report Parameters, the Basic Monitoring Report (including Summary and Recap), and, the Progress Report with Analysis (by Manager).

RD - Campaign Reporting (Part 2)

This session continues the introduction to accessing campaign results in ANDAR. Topics include: the Campaign Pace Report, the Multi-Year Report, and the Pattern and Tracking Parameters Analysis selection tabs in Data Mining.

DBII

Various tips regarding how best to enter, organize, and extract the data required for this report will be discussed.

ANDAR Connector

This session will provide an overview of the data import process and will include a discussion of what data can be imported into ANDAR using this tool.

RD – Campaign Rollover

Rollover is the term used to describe the process of preparing the database for a new campaign year. In addition to an examination of the two Rollover jobs (Non-Campaign and Campaign), this session will also include a list of other 'year change' related tasks that are not addressed by the Rollover jobs.

RD – MIG Campaign Features

This session will provide an overview of the MIG features available on profiles that are pertinent to Resource Development. Topics include: Dashboard and Bio tab items, Gift Months, Hot Buttons, Pledge Alerts, Filters, and Gift Relationships.

RD – Leadership

Basic leadership functionality (Bio tabs, Combined Giver Names, Salutations, Mailing Lists, and Overrides), Reports, and Analysis tools will be discussed.

RD – Prospecting

The Prospect features help cultivate and solicit funds by enabling move states, touch points, linkages, giving ability, and interest ratings to be tracked and reported on targeted accounts. This session will focus on the process of implementing your organization's strategy from set-up through reporting.

REAL BEDARD – ROOM 5

What is CRM?

Are you confused about CRM? What is it and what it is not. What's in it for you? What can I do to implement CRM. This presentation does not discuss Andar specifically. Instead, it explores CRM concepts and how to effectively position your organization for CRM. Audience participation is encouraged.

CRM Executive Level

Following a brief introduction to CRM, this session provides an executive-level overview of the functions available in Andar to support relationship building activities. Discussions will include how the various departments within the organization can align and coordinate their efforts in a donor centric strategy.

CRM - A Detailed Look at What Andar Can do For You

This session will explore how Andar can be used to eliminate silos within your organization and coordinate your relationship building activities. The session will also address how various features of Andar relate specifically to CRM.

CRM Best Practices

This interactive session encourages open discussion and sharing of CRM best practices. The session includes guidelines for tracking relationships and monitoring prospecting activities. Simple and straight-forward steps to get started on a CRM strategy will be discussed.

e-Community Style Sheets

Andar uses style sheets to lay out and brand letters, documents, e-mails, and your e-Community web site. This session will explore how to code style sheets and how to apply them to various Andar communication channels. Familiarity with basic programming or scripting strongly recommended.

Outlook Connector

This session starts with a short overview of the Outlook Connector module configuration. Then the session explores a day in the life of resource development staff and how they can use Outlook Connector to assist them in their day-to-day tasks.

CRM New Features

Following a short introduction to CRM, this session explores the features recently released in Andar to support CRM activities. New features include plans, workflows, prospecting, segmentation, dashboards, executive plus, outlook connector, content management, and many more.

ERIC CRAMMOND – ROOM 7

CMS – Overview

This class will provide an overview of the Andar based content management system.

CMS – e-Mail Marketing Tool

This class will cover the basics of sending an e-mail from Andar using the content management system. This class will cover the set up, production and, tracking of these emails.

CMS - Managing Subscriptions

Andar has the ability to track subscriptions to your newsletters and other productions. This class will be a step by step guide showing you how to set up and maintain this feature of Andar.

CMS – Run your public website

Did you know that Andar can host and run your public website? This class will provide attendees with the background of using this tool. The class will cover how to create and publish a website using Andar.

CMS – How to tie in web components

With all the web features and capabilities that Andar has how can I use them all effectively and efficiently together to benefit my organization? If you have ever wondered this you should think about attending this class. The class will showcase many of the web components and how they can be easily integrated together to create a unified marketing strategy.

CMS – Web Portlets & PURLs

Web portals and PURLs will enhance your organization's marketing and branding strategy when it comes to the web. This session will show users how to create Pretty URL's like myorganization.org/give and have it direct to the individual giving page in e-Pledge or myorganization.org/grants and have it direct you to the eCommunity Building log on page. Web portlets allow you to place web gadgets on your Andar run website. You are able to place a Youtube video on the website, banner ads, executive plus components and many more. This session will cover how to create and publish these items to the web.

CMS - Thank you Letter Enhancements (MIG Only)

With 2010.01 Andar will now allow Thank You Letters to be output directly to a PDF file, available to MIG licensed customers only. This session will be an introduction to how this new Andar feature works. Topics will include: setup, thank you letter creation and examples how this new feature can enhance your organizations communication strategy.