



CRM-100: CRM Administration for Nonprofits

Expanding Your Possibilities

Let Etherios' CRM Administration for Nonprofits course be your organization's catalyst in discovering how salesforce.com's award winning CRM software can satisfy your organization's data management, process, and reporting needs. This course uses salesforce.com's Nonprofit Edition to teach you how to apply the same vital customer relationship management (CRM) strategies that winning corporations use in order to elevate and increase the impact you and your nonprofit organization can make on your communities.

Who Should Attend?

This hands-on, instructor-led virtual course is designed for new system administrators, end users with system admin permissions or specialized disciplines such as Marketing Directors, Program or Development Managers, as well as prospective nonprofit organization's still considering whether or not to use Salesforce as their CRM system of choice.

What is the Structure of the Course?

CRM Administration for Nonprofits addresses realistic nonprofit scenarios as a premise for learning by utilizing records within a pragmatic practice organization. Participants will listen to a detailed description of a concept and then engage in a series of hands-on exercises in order to not only gain valuable insight as to how each concept can be tailored for your nonprofit, but also learn how to accomplish each core process within Salesforce.

The CRM Administration for Nonprofits course is delivered by a live instructor over the internet and is structured for a small audience. We want to ensure that each student receives the needed attention during the exercises, so that your organization earns a maximum return on your training investment.

What Will Students Learn?

Nonprofit Administrative Course includes:

- ~ Customization
 - Custom Fields
 - Custom Objects & Apps
 - Custom Profiles
 - Page Layouts
 - Record Types
 - Field Level Security
- ~ Security & Access
 - Record Ownership
 - Organization Wide Defaults
 - Role Hierarchy
 - Sharing Rules
 - Add a New Hire
- ~ Donation/Outreach Management
 - Build a Campaign
 - Add Leads/Contacts
 - Assignment Rules
 - Web-to-Lead Form
 - Campaign Reports
- ~ Common Nonprofit Issues
 - Membership
 - Program Management
 - Donation Process
 - Volunteering
 - Email Templates
- ~ Support Administration
 - Assignment Rules
 - Escalation Rules
 - Life of a Case
 - Self-Service Portal
 - Console
- ~ Reporting Basics
 - Standard Reports
 - Custom Reports
 - Custom Report Types
 - Dashboards
- ~ Data Utilities
 - Import Wizard
 - Data Loader
- ~ Workflow, Workflow Approval Processes, & Data Validation
 - Workflow Actions
 - Jump Start Wizard vs. Standard Wizard
 - Create & Test Data Validation Rules

Locations: Chicago, IL and Dallas, TX



Class Comparison

Topics Covered/Attributes	Salesforce.com	Etherios
	ADM-201	CRM-100
Price	\$1500	\$1000
Tailored for Nonprofits		✓
Travel Expenses Incurred	✓	
Exp. Consultants as Instructors	Toss-Up	✓
Troubleshooting Doc Provided		✓
Profile Components	✓	✓
Reporting/Dashboards	✓	✓
Record Ownership	✓	✓
OWD/Role Hierarchy/Sharing Rules	✓	✓
Campaign/Lead Management	✓	✓
Case Management	✓	✓
Import Wizard/DataLoader	✓	✓
Data Validation Rules	✓	✓
Workflow/Approval Process	✓	✓
Chatter	✓	✓
Nonprofit Starter Pack		✓
Donation Management		✓
Program Management		✓

Prerequisites

The recommended prerequisite skills include:

- Basic understanding of Salesforce & Nonprofit Starter Pack terminology
- Basic navigation skills within the Salesforce application

Both of the aforementioned skills can be attained by attending the Salesforce.com Foundation's weekly live nonprofit webinar (approximately 2 hours). Visit their website for more information:

<http://www.salesforcefoundation.org>.

Locations: Chicago, IL and Dallas, TX



Cancellations

Cancellations will be accepted free of charge up to 72 hours prior to the start of class. Cancellations within 72 hours of the class will incur a 50 percent course fee charge. No-shows will be charged the full course fee.

Duration & Delivery Format

Three Half-Days of Online Instruction

Each half-day will consist of 6 hours of instruction. The illustrations and exercises will build on one another to demonstrate how a real-life nonprofit would operate utilizing Salesforce. Each half-day begins at the same time each successive day.

Example Schedule:

Day 1: 11:00am - 5:00pm each day

Day 2: 11:00am - 5:00pm each day

Day 3: 11:00am - 5:00pm each day

Pricing

The CRM Administration for Nonprofits course costs \$1000 (USD) per student. No travel expenses are required. This course is delivered virtually over the internet and phone. Group discounts available for parties of 3 or more, talk to an Etherios representative for details.

Registration

To register for the course just visit our website at <http://training.etherios.com>. There you will also find the list of upcoming classes in your preferred timezone.