DONORVIEW

Next Steps: DonorView Training & Support Options

Navigating Your Options

- Training Opportunities
- Support Plans

“You don’t have to be great to start, but you have to start to be great.” — Zig Ziglar

What is the difference between training and support?



- Training is proactive knowledge-building, learning skills to become proficient in using the software.
- Support provides assistance with quick questions, clarifying instructions, and troubleshooting issues.

Training Opportunities

You can start training anytime, but it is best to start as soon as you plan to use the software.

- **Initial Training Video Series**
  - *Start Strong: 10 Steps to DonorView Transition Success*
  - *DonorView QuickStart: Mastering the Basics*
  - *Next Steps:DonorView Training & Support Options (this video!)*
- **Go-Live Ready: Data Review**
- **Self-Directed Training**
  - *Support Academy*
  - *Support Videos & Articles*
  - *Group Training Webinars*
- **CRM Power Hour**
- **Specialized Training Sessions**

Initial Training Video Series

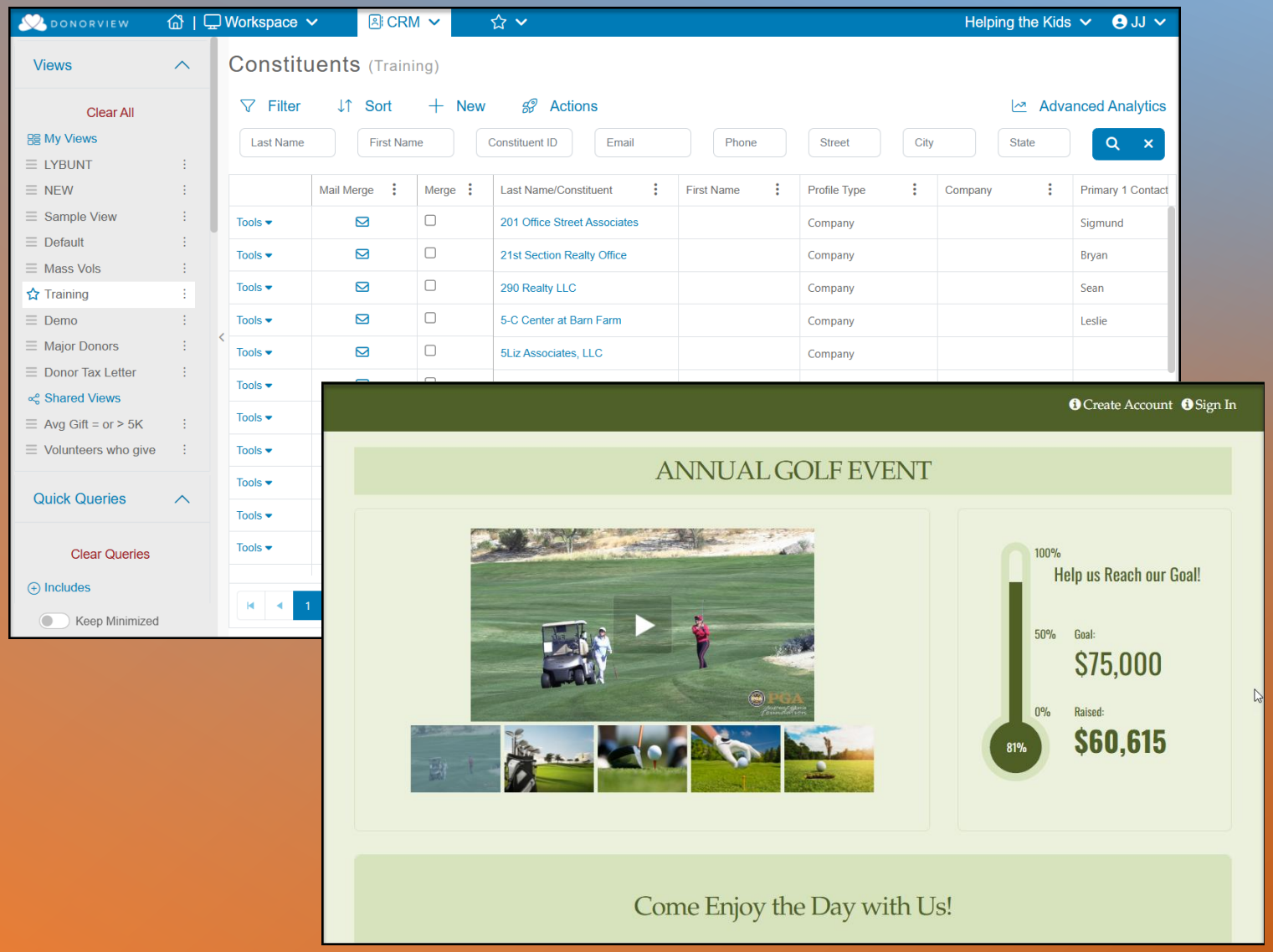
- **Start Strong: 10 Steps to DonorView Transition Success** – Kick off your CRM journey with this guide to the 10 essential steps to help you prepare your data, define workflows, and set the foundation for a smooth and successful transition.

- **DonorView QuickStart: Mastering the Basics** – Build a strong foundation with this core training, covering the essential features and workflows you'll need to confidently navigate and use the CRM in your day-to-day work.

- **Next Steps: DonorView Training & Support Options** - Explore the full range of training and support options available to you, so you can choose the right resources and sessions to support your role and learning journey.

- Delivered after your kick-off call with Implementation Manager
- Learn the basics
- Identify your workflows
- Determine your next steps
- Prioritize learning
- Access training and support resources

Go-Live Data Review



- Not training, per se, but an opportunity to review your data and pages with your Implementation Manager
- Ensure you understand what your data looks like in the database

Support Academy

The Support Academy provides a structured training plan. It is especially effective for users who want to be proficient in several areas of the software.

Support Site & Articles

The support site provides access to written articles and instructions on all the modules in the software.

Support Videos

Each module has at least one video covering the features in the video.

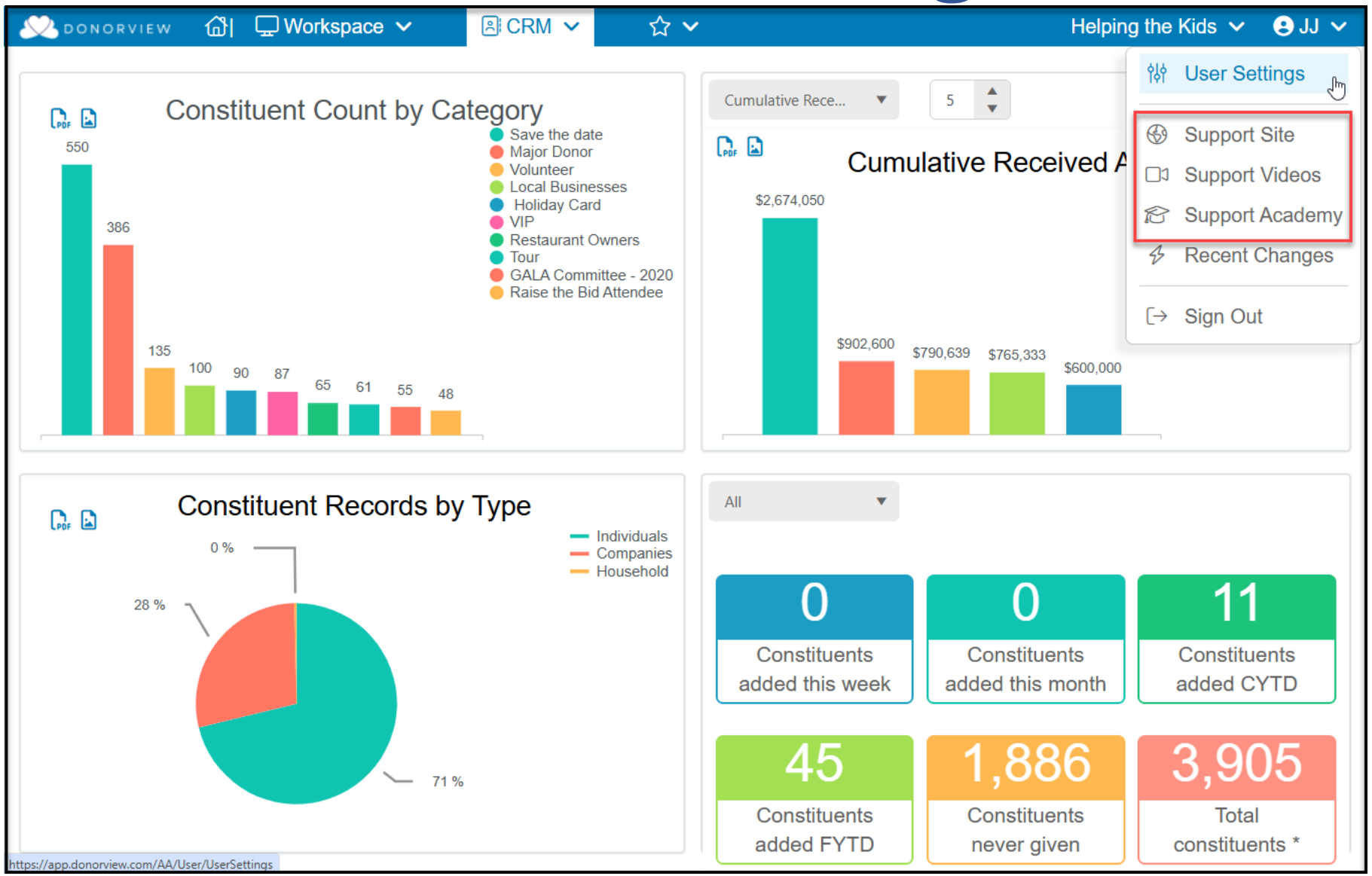
Group Training Webinars

Depending on your support level, live group webinars are taught via Zoom.

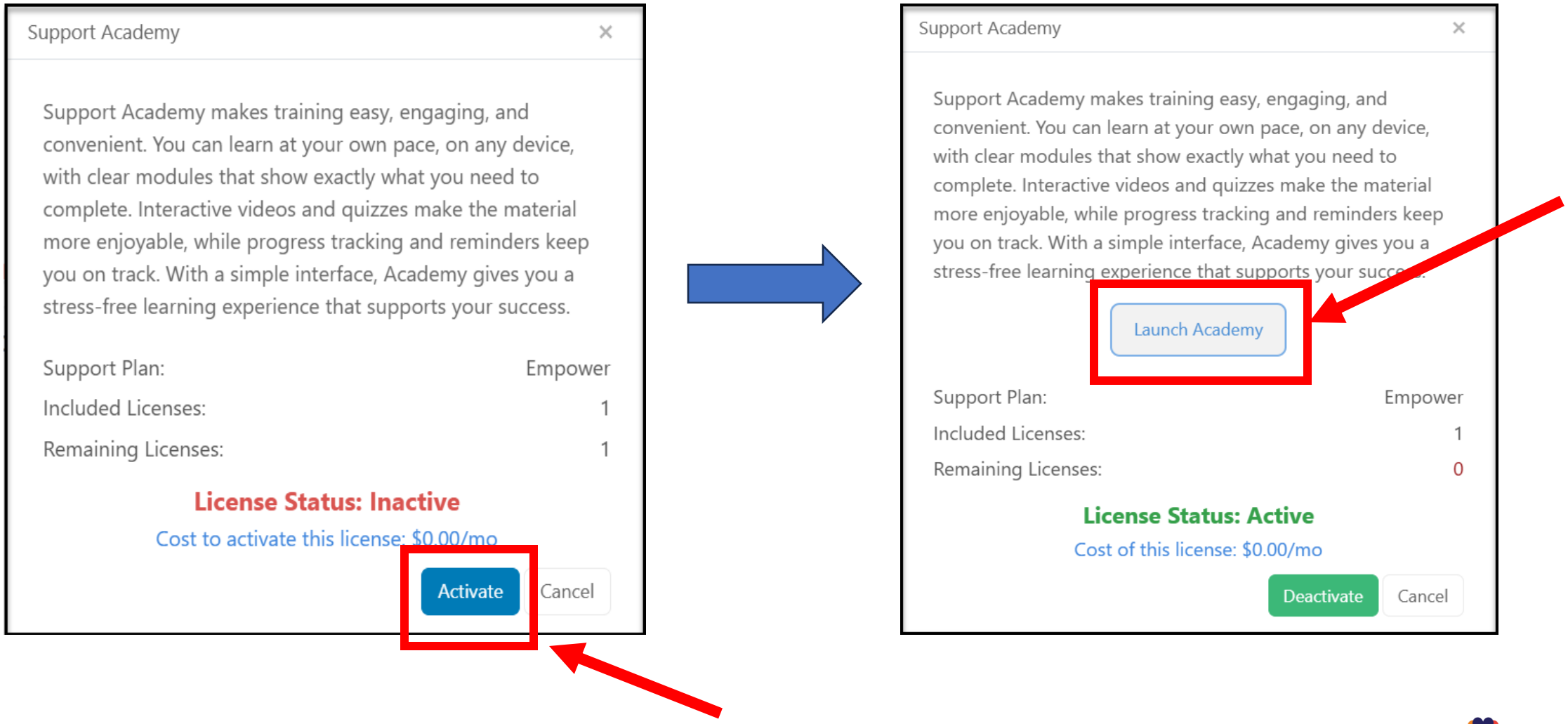
Self-Directed Training Options

"Action is the foundational key to all success." — Pablo Picasso

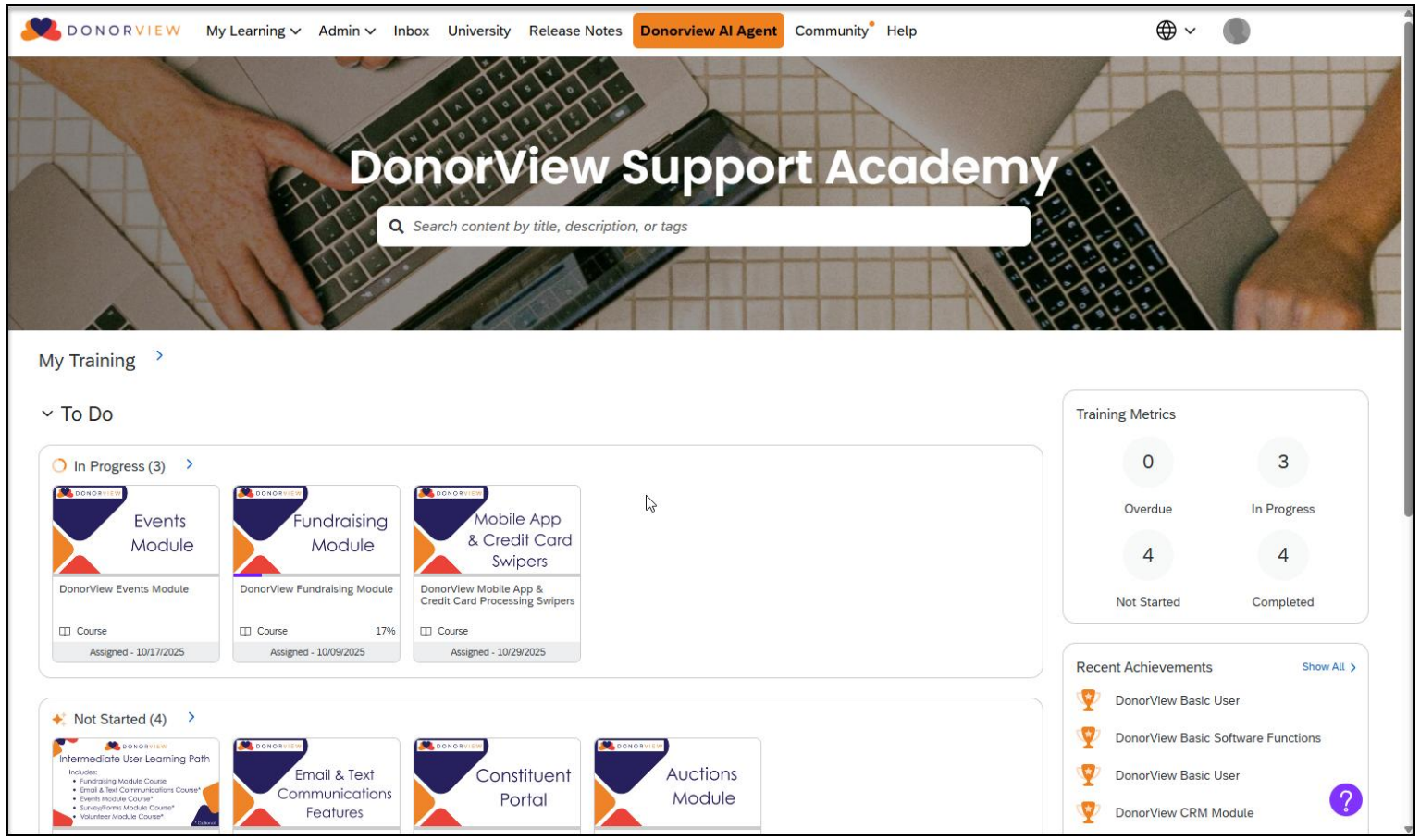
Links in User Settings Menu



Support Academy



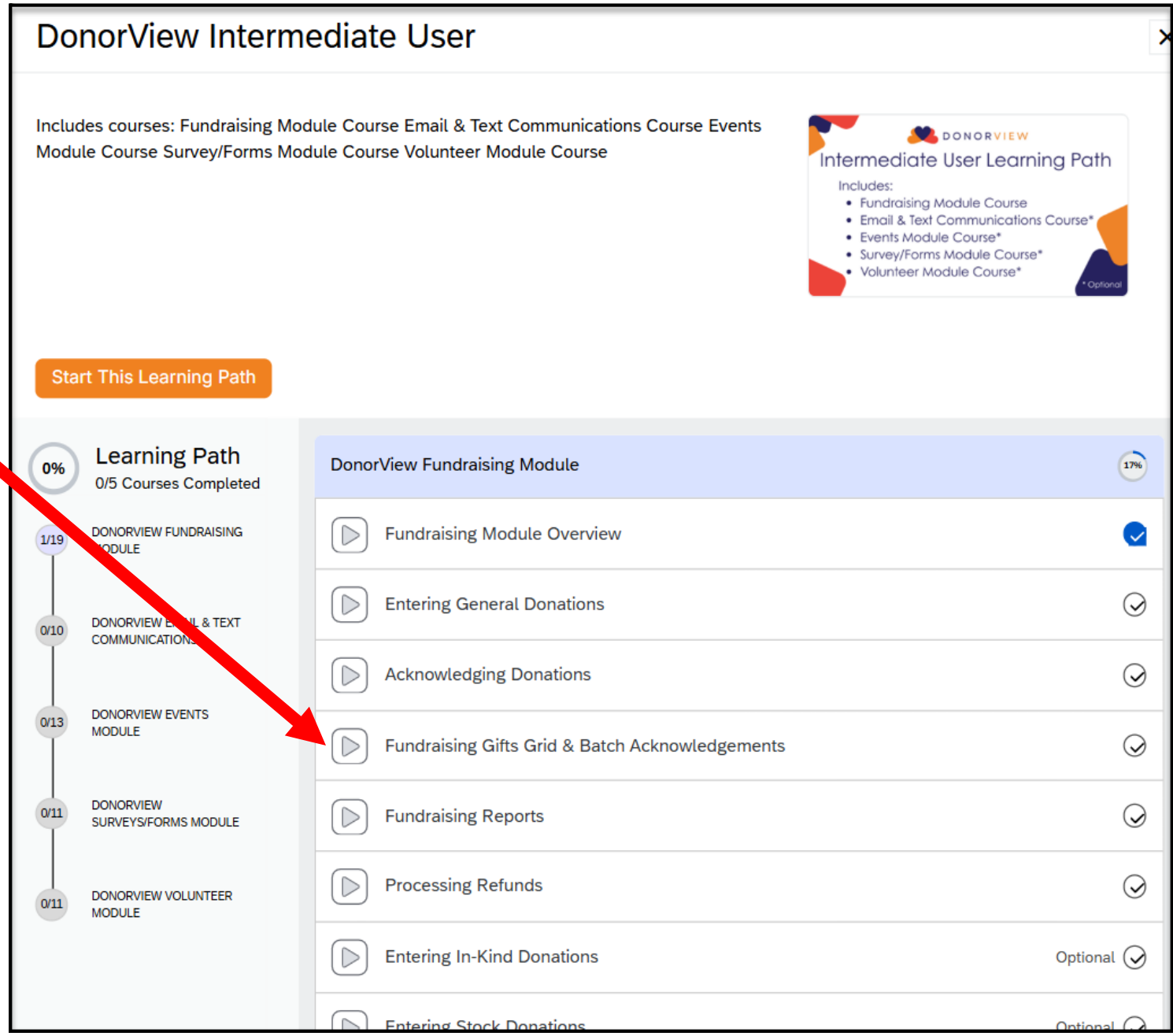
Support Academy



- Support Academy automatically assigns you to the Basic User Learning Path
- This learning path covers:
  - Welcome Video (general overview of software)
  - Basic Software Functions
  - User Settings
  - CRM Module
- We recommend completing all these courses to set the foundation for additional learning

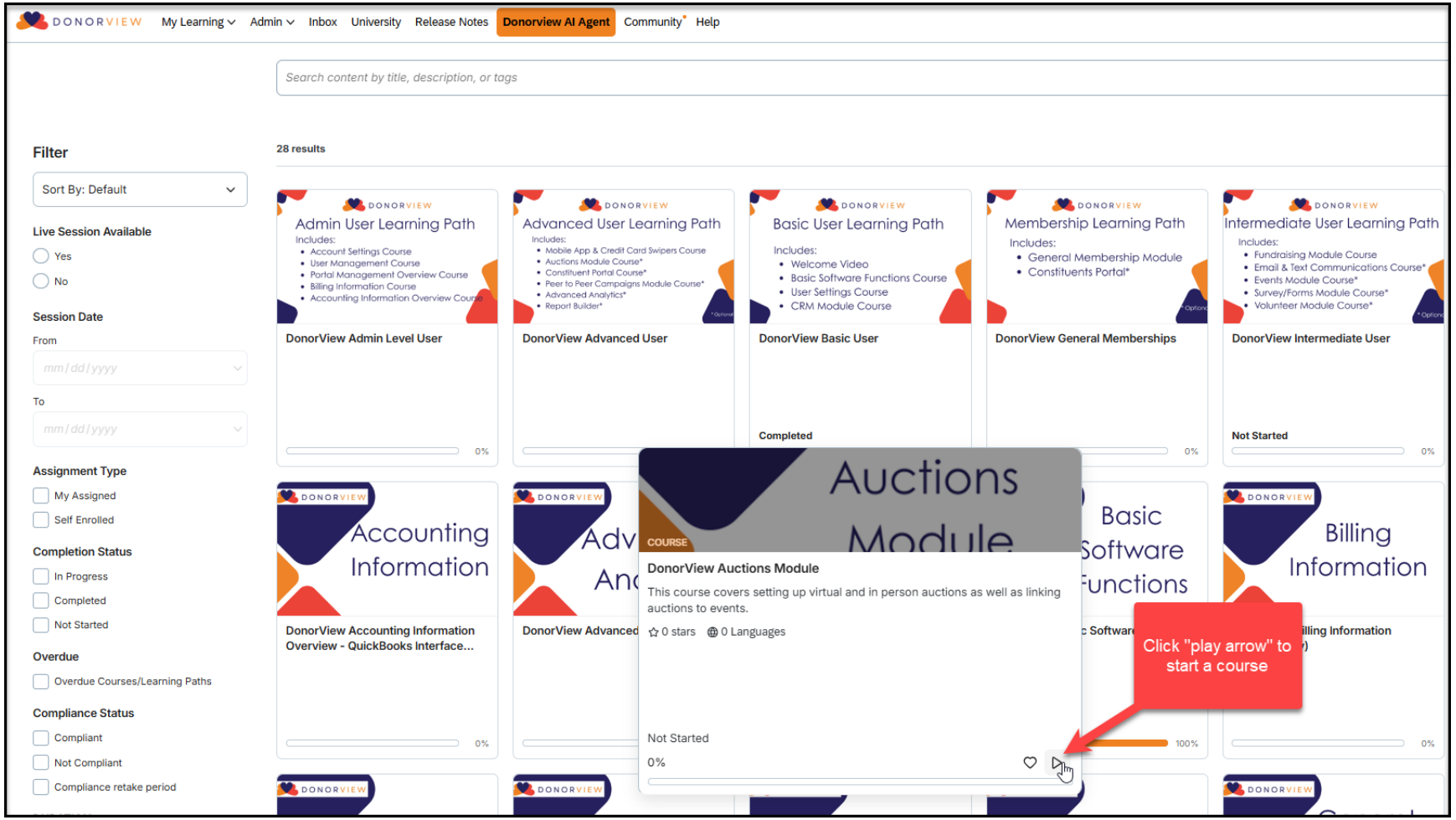
Support Academy

- From a Learning Path, all your courses and lesson modules will be listed in the recommended order
- Click the “Play” arrow to start the module
- Courses include written instructions, interactive links, quizzes and videos
- Time to complete each lesson depends on your own speed and comprehension so you can proceed at your own pace and review material anytime

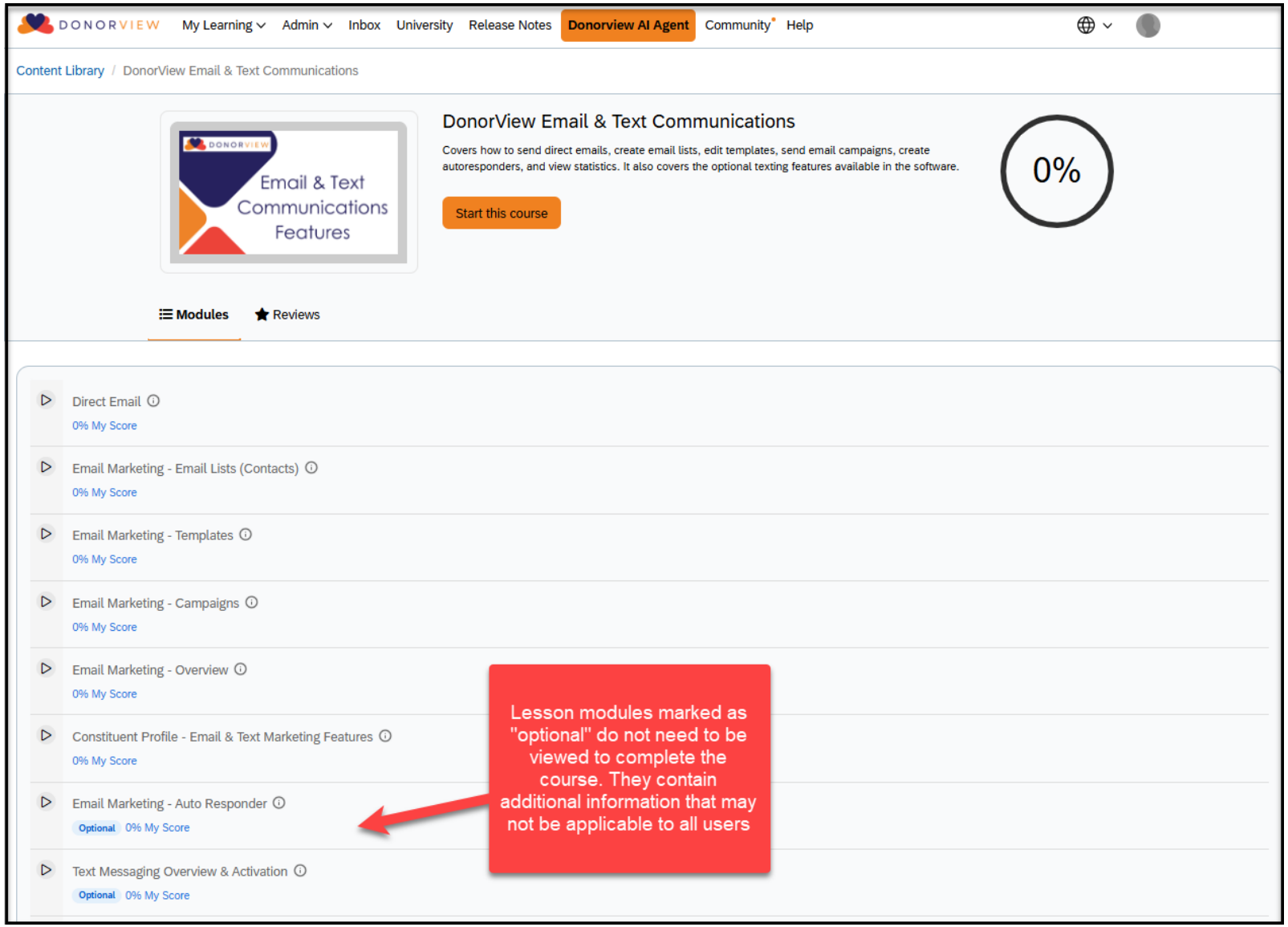


Support Academy – Learning Library

- Access the complete learning library to start any course
- Learning Paths are listed first, which group together courses based on user needs and experience level
- And all the individual courses are also listed in alphabetical order – just click the “play arrow” to start any course



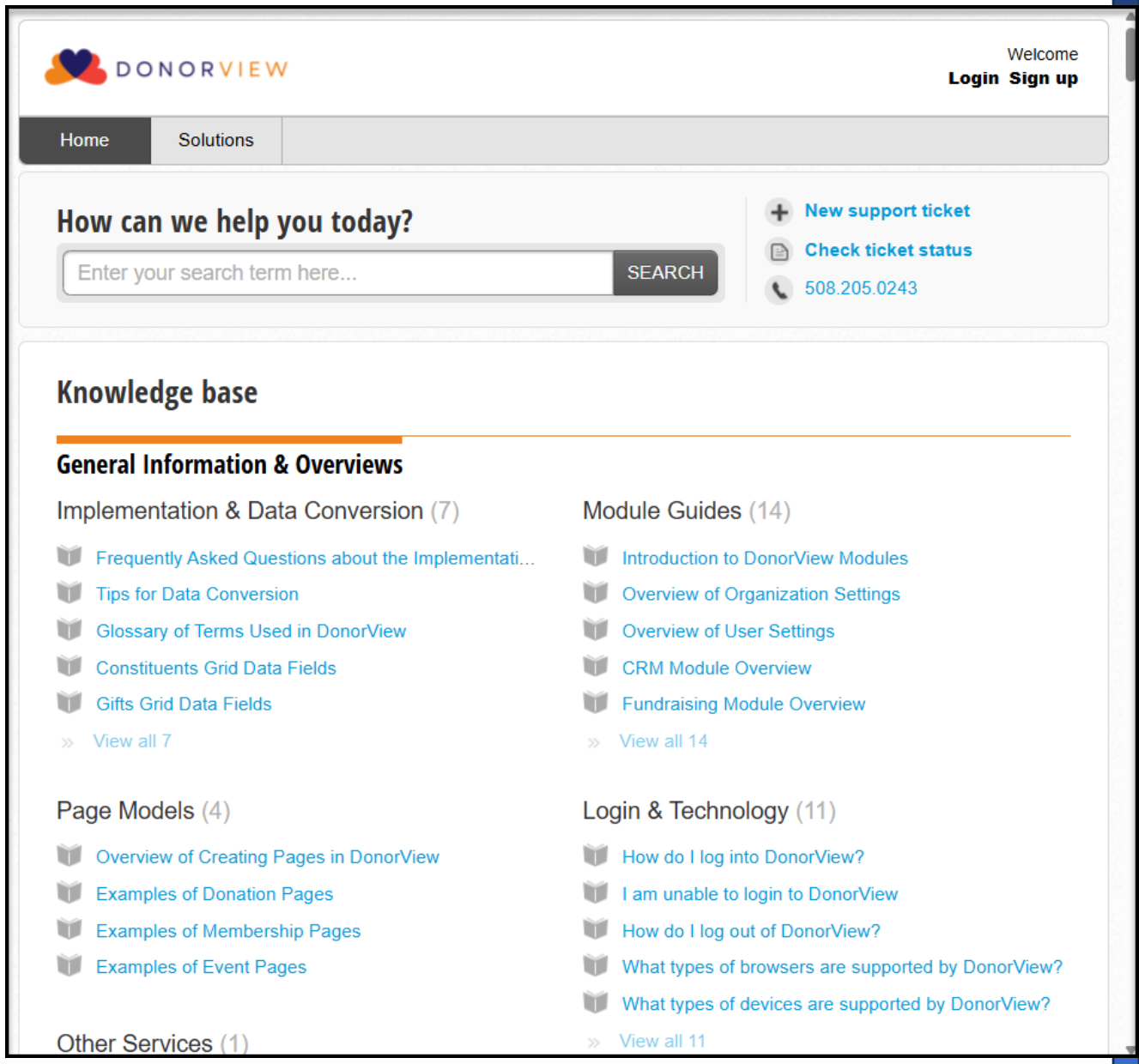
Support Academy – Track your progress



- Once you start any learning path or course, you can see your progress for the entire course, and each lesson
- Lessons can be performed out of order, but following the order outlined will result in the best experience
- Lesson modules marked as optional provide information on additional features that may not be necessary for all users and can be skipped as appropriate

Support Site

- Link available under user initials
- Provides written instructions, FAQs, guides, and how-to articles
- Search for topics to see a list of all articles relating to that topic
- Organized into chapters including:
  - General Information
  - Organization Account Management
  - User Management
  - Grids, Dashboards & Software Functionality
  - A chapter for each module in the software
  - Constituent Portal
  - Mobile App
  - Training Information



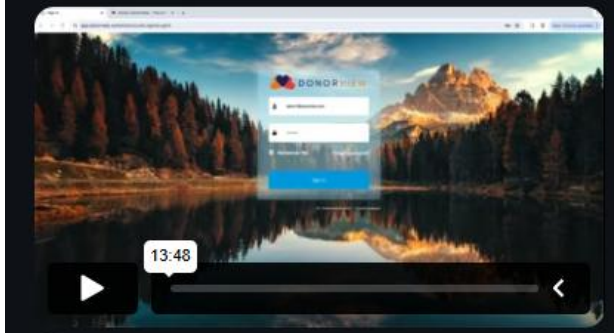
Training Videos

Start watching

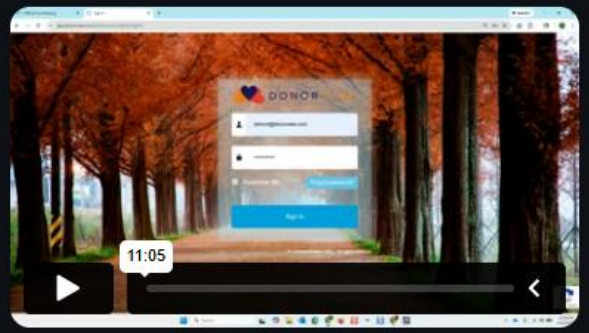
- Link available in menu under user initials
- Pop up shows current password
- Search for topics
- Each module has at least one video showcasing its features

127 videos

Autoplay next



Welcome to DonorView
ConnectedView



DV Support Academy
ConnectedView



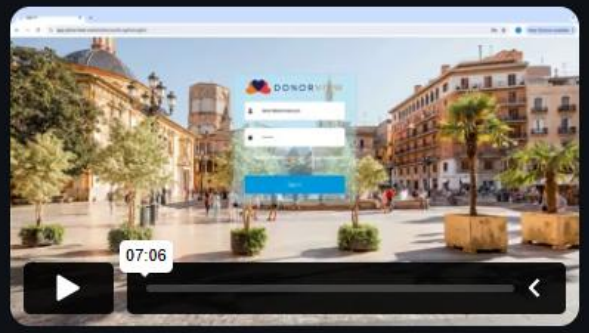
DonorView Spring 2025 Release Preview
ConnectedView



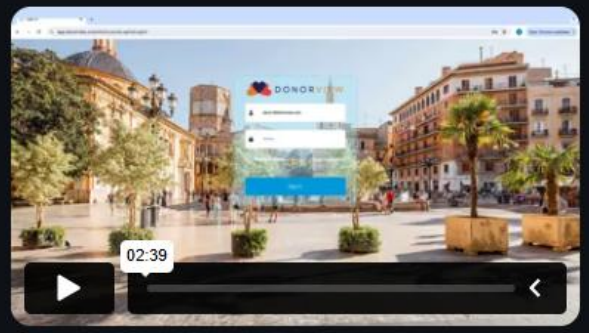
Account Settings*
ConnectedView



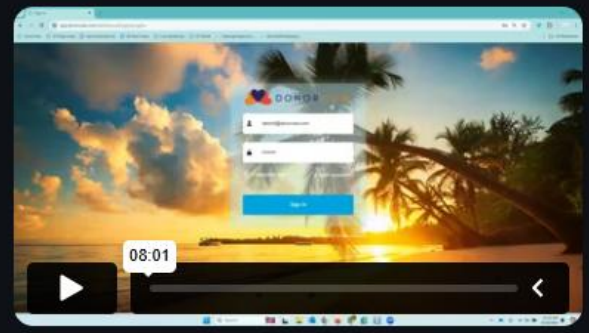
Bank Information Account Settings*



Saved Credit Cards and Expiration Notifi...

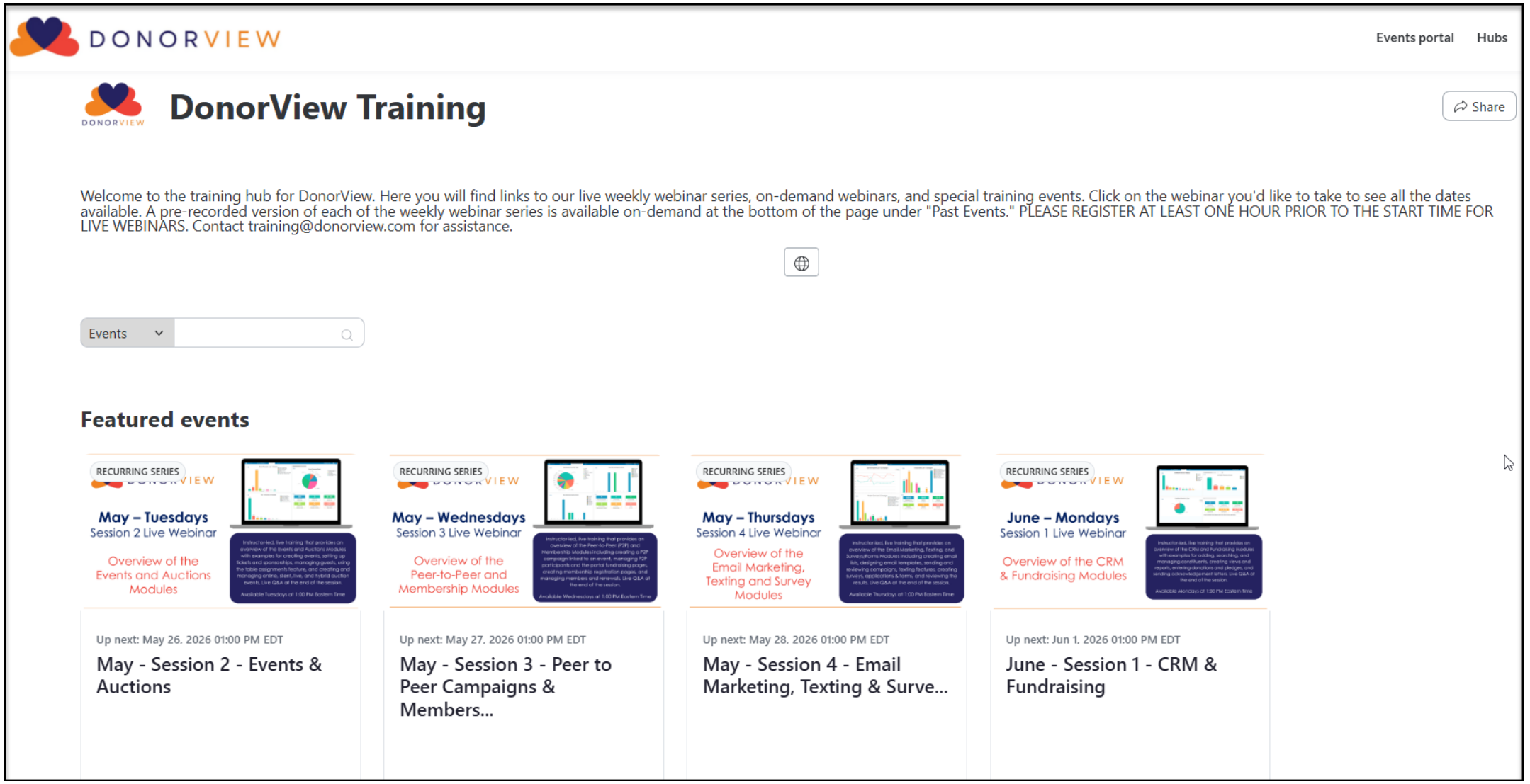


Social Media Account Settings*



Additional Payment Methods*

Group Training Webinars



Group Webinars

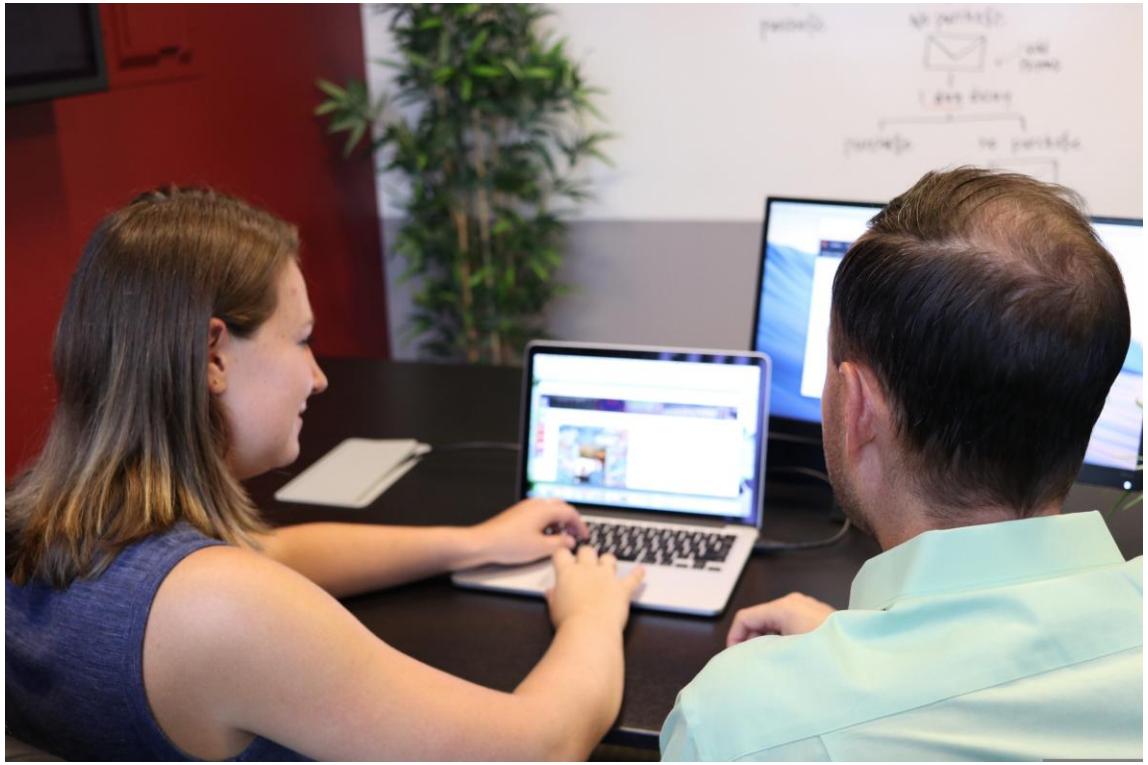


- Group training webinars are available for customers with **Empower** and **Elevate** support plans
- A link to register at the Zoom training hub will be sent with training information
- The 60-minute webinars are taught live with time for Q&A
- Pre-recorded sessions are also available on-demand
- Dates and times available are shown on the training hub
- Webinars cover fundamentals for the main software modules with recurring sessions for:
  - CRM & Fundraising
  - Events & Auctions
  - P2P Campaigns & Memberships
  - Email Marketing, Texting, and Surveys

CRM Power Hour

Applying Your Training in Real Scenarios

- Ask targeted questions and get expert guidance on applying DonorView to your real-world workflows and scenarios
- Offered after data conversion is complete and you have completed your self-directed training
- Private zoom session, your organization only
- Invite as many team members as you like to join and the session will be recorded
- Great for:
    - Reviewing event and auction setups
    - First time peer to peer campaigns
    - Setting up your constituent portal
    - Building reporting skills



Specialized Training Sessions are available a la carte

- Each session is 50 minutes
- Delivered via zoom
- Can invite unlimited team members to join
- Private, your organization only
- Sessions are recorded for you to download
- Cover any topics or questions about the software
- Current cost is $125/session

Specialized Training Sessions

SUPPORT PLANS



Support Plans

- There are three support plans available:
  - Enable
  - Empower
  - Elevate
- Your support plan determines:
  - What support options are available to your organization
  - What training is included with your plan
  - Additional training is available for a fee if it is not included in your plan

Types of Support

Email

- Unlimited email support included with all plans
- Requests for assistance can be submitted by sending an email to support@donorview.com
- Or by submitting a support ticket via the Support Site

Phone

- Telephone support available with Empower and Elevate support plans only
- Call support line at 508-205-0243 and leave message for an agent to return your call
- Include details about the issue to ensure the right support agent returns your call



ENABLE

- Included free with your subscription
- Unlimited email support
- Training included:
  - Initial Training Video Series
  - One (1) Go Live Ready: Data Review
  - Unlimited access to Training Videos & Support Articles
  - One (1) CRM Power Hour
- Optional Additional Training
  - Support Academy – Additional $10/user/month
  - Specialized Training Sessions – Additional $125/session

EMPOWER

Free to all new customers for first 60 days!

- Fee based on number of constituents
- Unlimited email support
- 90 minutes of telephone support available each month
- Training included:
  - Initial Training Video Series
  - One (1) Go Live Ready: Data Review
  - Unlimited access to Training Videos & Support Articles
  - One (1) included user license for Support Academy
  - Unlimited access to group training webinars
  - One (1) CRM Power Hour
- Optional Additional Training
  - Support Academy – Additional licenses $10/user/month
  - Specialized Training Sessions – Additional $125/session

ELEVATE

- Fee based on number of constituents
- Unlimited email support
- 120 minutes of telephone support available each month
- Training included:
  - Initial Training Video Series
  - One (1) Go Live Ready: Data Review
  - Unlimited access to Training Videos & Support Articles
  - Three (3) included user licenses for Support Academy
  - Unlimited access to group training webinars
  - One (1) CRM Power Hour
  - Three (3) Specialized Training Sessions each year
- Optional Additional Training
  - Support Academy – Additional licenses $10/user/month
  - Specialized Training Sessions – Additional $125/session

Questions about training?
Reach out to
training@donorview.com

Questions about support plans, your contract, or pricing?
Reach out to
support@associationsphere.com



Previous videos in this series:

Start Strong: 10 Steps to DonorView Transition Success
Kick off your CRM journey with this guide to 10 essential steps that help you prepare your data, define workflows, and set the foundation for a smooth and successful transition.

DonorView Quick Start: Mastering the Basics
Build a strong foundation with this core training, covering the essential features and workflows you'll need to confidently navigate and use the CRM in your day-to-day work

Good luck on your journey and thank you for watching!