I. Welcome

A. Welcome to the Next Steps: DonorView Training & Support Options video.

1. In this video we will review the training opportunities available as well as the different levels of support plans.
2. As Zig Ziglar famously quoted "You don't have to be great to start, but you do have to start to be great."
3. Sometimes getting started is the hardest part, but once you get rolling and start gaining some experience your confidence will grow and you will be amazed at what you can accomplish.
4. For clarity, there is a difference between training and support.
    a. Training is proactive knowledge-building, learning skills to become proficient in using the software.
    b. Support provides assistance with quick questions, clarifying instructions, and troubleshooting issues.
    c. Sometimes the support team will refer you to training resources like videos and support articles to help you resolve your issues if the response requires more than a few steps or screenshots. For example, if you submit a support ticket that says, "How to I create an event?" the team will respond with links to videos and articles to provide the step-by-step instructions you need to complete the task.

II. Training Opportunities

A. DonorView provides a variety of training opportunities.

B. You can start anytime, but it is best to start as soon as you wish to start using the software. You do not need to wait until your data is converted.

C. Training opportunities include:

1. Initial Training Video Series
    a. Start Strong: 10 Steps to DonorView Transition Success
    b. DonorView Quick Start: Mastering the Basics
    c. Next Steps: DonorView Training & Support Options
2. Go-Live Ready: Data Review
3. Self-Directed Training
    a. Support Academy for a structured learning plan
    b. Support Videos and Articles to create your own learning plan
    c. Group Webinars – available with Empower and Elevate support plans
4. CRM Power Hour
5. Specialized Training Sessions

D. So, let us look at each of these in more details.

E. Initial Training Video Series

1. Delivered after your kick-off call with Implementation Manager
2. Intended to show you how to do the basics
3. Helps you identify your workflows and determine your next best steps
4. It prioritizes learning as a way to succeed with the software
5. It shows you how to access training and support resources
6. The three videos include:
    a. Start Strong: 10 Steps to DonorView Transition Success kicks off your CRM journey with a quick guide to 10 essential steps that help you prepare your data, define workflows, and set the foundation for a smooth and successful transition.
    b. DonorView QuickStart: Mastering the Basics builds a strong foundation with core training, covering the essential features and workflows you will need to confidently navigate and use the CRM in your day-to-day work.
    c. This video, Next Steps: DonorView Training & Support Options where we 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.

F. Go-Live Data Review

1. This is not specifically a training session but instead an opportunity to review the data and the pages they created for you with your implementation manager.
2. This session helps you to understand what your data looks like in the software.
3. If you have not started training yet, you want to be sure to start now that your data has been converted.

G. Self-Directed Training Options

1. We use the term self-directed training because you will be performing this training on your own.
2. You determine what resources and options are best for you and your team.
3. There are several options available including:
    a. Support Academy which provides a structured training plan. It is especially effective for users who want to be proficient in several areas of the software.
    b. Support Site which provides access to written articles and instructions on all the modules in the software.
    c. Support Video library where each module has at least one video covering the features.

d. Group training webinars are taught live or on-demand several times a week. Depending on your support level, live group webinars are taught via Zoom.

e. Group training webinars are limited to Empower and Elevate customers.

4. While you are logged into DonorView, you can find links to the Support Academy, Support Site, and Video library in the menu under your user initials.

5. Links to the group webinars are sent to customers with the Empower and Elevate support plans only.

H. The Support Academy

1. The Support Academy is going to be the most complete resource for learning the software.

2. When you click the link for the Support Academy, if it has not been activated yet, you can click on the blue link to Activate.

3. Note that if you support plan does not include Support Academy licenses, or the licenses included have all been assigned to other users at your organization, there may be a fee to activate the license.

4. The current fee is $10 per month, per user and it can be deactivated anytime.

5. Once your license is activated, you will find a link to Launch Academy to start or resume your courses.

6. The green Deactivate button allows you to deactivate your license. If you wish to reactivate, you can and the software will remember where you left off so you can pick up without starting over.

7. Support Academy automatically assigns you to the Basic User Learning Path

   a. This learning path covers:

      i. Welcome Video (general overview of software)

      ii. Basic Software Functions

      iii. User Settings

      iv. CRM Module

   b. We recommend completing all these courses to set the foundation for additional learning

8. Learning Path

   a. From a Learning Path, all your courses and lesson modules will be listed in the recommended order

   b. Click the “Play” arrow to start the module

   c. Courses include written instructions, interactive links, quizzes and videos

   d. Time to complete each lesson depends on your own speed and comprehension so you can proceed at your own pace and review material anytime

9. Learning Library
    a. Access the complete learning library to start any course
    b. Learning Paths are listed first, which group together courses based on user needs and experience level
    c. And all the individual courses are also listed in alphabetical order – just click Play to start any course
10. The Support Academy allows you to track your progress
    a. Once you start any learning path or course, you can see your progress for the entire course, and each lesson
    b. Lessons can be performed out of order, but following the order outlined will result in the best experience
    c. Lesson modules marked as optional provide information on additional features that may not be necessary for all users and can be skipped as appropriate

I. Support Site
    1. Link available under user initials in top right
    2. Provides written instructions, FAQs, guides, and how-to articles
    3. Search for topics to see a list of all articles relating to that topic
    4. Organized into chapters including:
        a. General Information
        b. Organization Account Management
        c. User Management
        d. Grids, Dashboards & Software Functionality
        e. A chapter for each module in the software
        f. Constituent Portal
        g. Mobile App
        h. Training Information

J. Support Videos
    1. Like the Support Academy and Support Site, there is a link available in menu under user initials
    2. When you click the link, a pop up shows current password which is "DVOnDemand"
    3. You can enter the name of the module in the search bar to search for videos related to that module
    4. Each module has at least one video showcasing its features

K. Group Training Webinars
    1. Group training webinars are offered through the Zoom Training Hub

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

L. The CRM Power Hour is available for customers who complete their self-directed training and wish to have a personal session for specific questions
    1. Each organization has one session included with their on-boarding process as part of the contract
    2. You can ask targeted questions and get expert guidance on applying DonorView to your real-world workflows and scenarios
    3. These sessions are offered after data conversion is complete and you have completed your self-directed training; the training team will send your organization's primary contact an invitation to schedule the session
    4. The sessions are private for your organization only and delivered via zoom
    5. You can invite as many team members as you like to join, and sessions are recorded for your to download and share
    6. These sessions are great for:
        a. Reviewing event and auction setups
        b. First time Peer to Peer Campaigns
        c. Setting up your constituent portal
        d. Building reporting skills

M. Specialized Training Sessions
    1. The final option available for training is specialized sessions
    2. These sessions are available a la carte, and you can request one anytime
        a. Each private session is 50 minutes long and delivered via zoom
        b. You can invite unlimited team members to join, and it will be recorded for you to download

c. This session is similar to the Power Hour, and it can cover any topics or questions you have about the software

d. You just need to let the training team know what you would like to discuss prior to the session so they can ensure that a trainer knowledgeable in that topic will be available

3. Current cost is $125/session, and it will be automatically charged to the payment method you have on file

III. **Support Plans**

A. There are three support plans available:

1. Enable
2. Empower
3. Elevate

B. Your support plan determines:

1. What support options are available to your organization
2. What training is included with your plan
3. Additional training is available for a fee if it is not included in your plan

C. Remember we mentioned previously the difference between training and support.

1. Training is where you are learning step-by-step how to complete tasks using the software.
2. Support is there to help you when you get stuck or when there is an issue or bug in the software.

D. Types of Support

1. Our support team is all based in the USA and you can receive support in two formats.
2. Email
    a. Unlimited email support included with all plans
    b. Requests for assistance can be submitted by sending an email to support@donorview.com
    c. Or by submitting a support ticket via the Support Site
3. Phone
    a. Telephone support available with Empower and Elevate support plans only
    b. Call support line at 508-205-0243 and leave message for an agent to return your call
    c. We do not offer live answering on the support line, so you will leave a message with your name, the organization you are with, details about your issue, and when the best time to return your call will be.

d. Including this information ensures that a support agent knowledgeable in that area will return your call

E. The three support plans include:

1. Enable
    a. Included free with your subscription
    b. Includes unlimited email support
    c. Training included:
        i. Initial Training Video Series
        ii. One (1) Go Live Ready: Data Review
        iii. Unlimited access to Training Videos & Support Articles
        iv. One (1) CRM Power Hour
    d. Optional Additional Training
        i. This plan does not include any licenses for the Support Academy, but you can purchase them for $10/user/month, and it can be cancelled anytime
        ii. Specialized Training Sessions are also available for an additional $125/session
2. Empower
    a. Take advantage of the 60 days of free access here!
    b. The fee for this plan is based on the total number of constituents in your database
    c. Includes unlimited email support
    d. Also includes up to 90 minutes of telephone support each month
    e. Training included:
        i. Initial Training Video Series
        ii. One (1) Go Live Ready: Data Review
        iii. Unlimited access to Training Videos & Support Articles
        iv. One (1) included user license for the Support Academy
        v. Unlimited access to the group training webinars
        vi. One (1) CRM Power Hour
    f. Optional Additional Training
        i. You can purchase additional licenses as needed for $10/user/month and it can be cancelled anytime
        ii. Specialized Training Sessions are also available for an additional $125/session

3. Elevate
    a. The fee for this plan is based on the total number of constituents in your database
    b. Includes unlimited email support
    c. Also includes up to 120 minutes of telephone support each month
    d. Training included:
        i. Initial Training Video Series
        ii. One (1) Go Live Ready: Data Review
        iii. Unlimited access to Training Videos & Support Articles
        iv. Three (3) included user licenses for the Support Academy
        v. Unlimited access to the group training webinars
        vi. One (1) CRM Power Hour
        vii. Three (3) Specialized Training Sessions each year
    e. Optional Additional Training
        i. You can purchase additional licenses as needed for $10/user/month and it can be cancelled anytime
        ii. Specialized Training Sessions are also available for an additional $125/session

IV. Wrap Up

A. So that wraps up our review of the training and support options available.

B. If you have questions about training, please reach out to training@DonorView.com.

C. If you have questions about support plans, your contract, or pricing, please reach out to support@DonorView.com.

D. If you missed the previous videos in this series, you can find them in the video library.

E. Good luck on your journey and thank you for watching!