

Getting Started with ResearchPoint™

An Introduction to your Prospect Research Solution

Welcome to ResearchPoint, your new tool to manage prospect research data. In combination with your constituent relationship management software, **ResearchPoint** can be a powerful asset as you research, understand, and connect with donors. From any Internet browser, you can log in, research, and send reports to development officers and key organization leaders.

Overview

WealthPoint Screening

Your work in **ResearchPoint** is powered by *WealthPoint*. With an array of comprehensive data sources — CoreLogic, Dun & Bradstreet, Experian, Federal Election Commission, Guidestar, Larkspur Data, Marquis Who's Who, NOZA, and Thomson Reuters— *WealthPoint* enables you to complete your prospect wealth research. During a wealth screening, Target Analytics searches all these sources of public data for your constituent.

More is More! —When you provide as much criteria as you know, like name, address, spouse, and date of birth, you'll have improved data results return with higher confidence ratings on a wealth screening. You can then analyze total publicly identifiable wealth, real estate, business, and philanthropic giving as you determine a prospect's capacity and inclination for a major gift to your organization.

How to Log in to ResearchPoint

Your administrator contact should receive an email from Blackbaud with your organization's administrative login information.

- **URL** – Log into your hosted **ResearchPoint** database from the latest version of your preferred Internet browser. Replace ##### with your organization's site ID.

Example:

<https://login.blackbaudondemand.com?SiteID=#####>

or

<https://login.blackbaudondemand.com?SiteID=#####RP>

The administrator will be invited by email to your new site. Once your administrator logs in with his or her Blackbaud single sign-on credentials, the individual application users can be invited by email from *Administration*, **Application Users**.

WealthPoint Data Sources

CoreLogic – Tracks the constituent's real estate holdings, including real estate valuation estimates. Identifies properties owned for a deed, parcel, and mortgage. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

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System Requirements

- For optimum performance, use the latest version of your preferred Internet browser.
- Set screen resolution display to 1024 x 768 or higher.
- Connect to the application web server via HTTPS.
- Use a workstation with a minimum of 2GB memory (RAM).

For full Blackbaud hosting recommendations, refer to

[System Requirements](#).

Dun & Bradstreet – The world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies. Provides you with data about the constituent's employment. This information is stored on the constituent's wealth and ratings record, Assets tab, under Businesses section.

Experian – Provides detailed consumer information to identify wealth indicators, such as household income and home value, as well as the number of children, discretionary spending estimate, and vehicle value. This data is accessed on the constituent's wealth and ratings record, Biographical Information tab, in the Biographical data section. The Experian data includes up to 5 household members and provides prospect demographics. If you click the Household Mosaic link, an Experian Mosaic USA Interactive Guide [PDF] appears. The guide provides a demographic profile of your constituent.

Federal Election Commission – Federal Elections Commission data, from the Internal Revenue Service, contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns. This information includes the amount of the contribution, the recipient, and the date. This information is stored on constituent's wealth and ratings record, Giving tab, under the Political donations section.

Guidestar – A leading provider in 501(c)(3) nonprofit organization data, GuideStar helps you identify nonprofit leadership and foundation affiliation. This information is stored on the constituent's wealth and ratings record, Affiliations tab, under the Nonprofit affiliations and Foundation affiliations tabs.

Larkspur – The leading provider in comprehensive wealth information, including the identification of luxury items such as yachts and planes, and millionaire codes. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Wealth indicators section. When you perform a wealth screen, particularly if not much data returns from the Target Analytics database, we recommend you look to see if a millionaire code returns. If a millionaire code returns from Larkspur, this may be an indication that this prospect has high wealth and warrants further research. For example, some prospects have hidden wealth that may not show up in public records.

Marquis Who's Who – Includes detailed self-reported biographical information on over 1,400,000 individuals. To obtain this information, Marquis matches the WealthPoint file against 20 volumes, including all regional publications: Who's Who in Finance & Industry, Who's Who of Emerging Leaders in America, and Who's Who in America. This data is accessed from the constituent's wealth and ratings record, Biographical Information tab, in the Biographical Data section.

NOZA – The world's largest database of public charitable donations. This information is stored on the constituent's wealth and ratings record, Giving tab, under Philanthropic gifts. For each donation, a gift range, organization donated to, organization category, gift year, and name on the gift returns. You can use the web address or source material to help you confirm the data belongs to your prospect.

Thomson Reuters – Provides SEC stock information and income/compensation data. Thomson Reuters SEC stock information includes stockholding information on public company officers, directors, and major shareholders. You are provided with the latest holdings, stock type, and type of ownership. In addition, Target Analytics obtains stock prices from BATS Exchange, a securities trading company that provides up-to-date trade information at the close of each trading day. The new price is included in the Direct holdings value and Indirect holdings value columns displayed on the Securities page. It is also included in the price information displayed in the Details pane of

the Securities page. The Securities page is accessed from the constituent Wealth and Ratings record, Assets tab, under Securities.

Thomson Reuters income/compensation data includes comprehensive biographical and financial information on officers and directors of over 20,000 companies worldwide. Insider data includes officer and board of director names, biographies, compensation, and stock options for over 9,000 U.S. public companies.

Prospect Research Wealth Record

Wealth information is data used to track your constituent's estimated wealth. Knowing the types and amount of wealth your constituents possess allows you to better determine cultivation strategies and determine the constituent's giving potential. From a prospect's wealth record, you can enter a variety of wealth-related information, such as real estate, stock, pension, and salary. If you subscribe to *WealthPoint*, the wealth screening solution from Target Analytics, you can also import all *WealthPoint* data obtained by Target Analytics.

WealthPoint

The *WealthPoint* service helps you identify your best major and planned gift constituents, attract and retain wealthy donors, maximize gifts, determine the wealth potential of your entire database, set reasonable campaign goals, and free up staff resources for person-to-person fundraising.

How to Review Wealth Data

For individual prospects wealth information is arranged in a series of tabs that categorize the data collected. The best way is to start with the Wealth Summary tab and work your way left to right. For more information about the prospect's wealth record, review the [Prospect Research Wealth Record guide](#).

Confidence Ratings and Match Codes

Each piece of data returned on a wealth record displays a confidence rating. It appears in the grids for the Assets, Giving, Affiliations, Biographical Information, and Social Summary tabs. For example, if you are looking at Securities data on the Assets tab, the Confidence rating column appears on the far right side of the Securities section.

✓ [check] icon = The information contained in the record is confirmed as correct.

★ [star] icon = WealthPoint used a piece of information in the recursive matching process to help identify a better match. For example, it locates a good Securities record match. It then uses the name of the company included in that record to make a better business ownership record match.

The rating indicates the relative strength of the match. For example, if confidence in the wealth information provided is very high, the rating number is "4"; if confidence in the wealth information provided is low, the rating number is "1". The following table explains each default confidence rating.

| Rating | Description |
|--------|--|
| 5 | Confirmed record – Any record confirmed in the application receives a 5 rating. You designate a record "Confirmed" by selecting the record and clicking the Confirm button. When you confirm a wealth information record, the Confidence number changes to "5" and a green check mark appears to the left of the selected entry. |
| 4 | Very high confidence |
| 3 | High confidence |

Tip: If the **Confidence** column does not appear, select the columns button to add it back to the grid.

Rating Description

| | |
|----------|--|
| 2 | Moderate confidence |
| 1 | Low confidence |
| 0 | Rejected record – Any record rejected in the application receives a 0 rating. You reject a record when you know for certain that the data does not belong to your constituent. You designate a record “Rejected” by selecting the record and clicking the Reject button. When you reject a wealth information record, the Confidence number changes to “0” and a red icon appears to the left of the selected entry. |

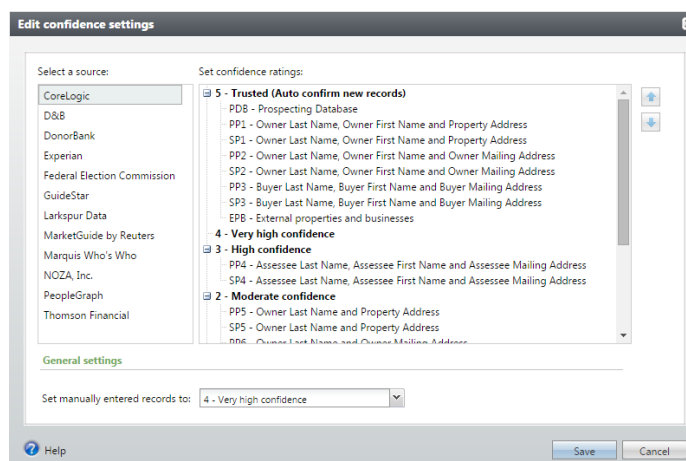
Match Codes

If you want to dig in more deeply about how we assign a confidence rating, it's important to understand how our match codes work. Every time we take

information about your prospect and send it to *WealthPoint* to find new data, we assign a code to how well the data matches. For example, if the prospect's last name, first name, and property address match data we find in *WealthPoint*, we assign that a PP1 and give it a confidence rating of 5.

If it's the spouse for the prospect and it matches on the spouse's

last name, first name, and address, we assign that a SP1 and also give it a confidence rating of 5. With a data match on first name, last name, and address, we are very certain that we found new information about your prospect.



However, for each data source in *ResearchPoint*, you can see and edit how the match codes are assigned to a confidence rating.

Research Lists

Research lists are groups of individual constituents. They help you more effectively research potential prospects in batches so you don't need to qualify prospects one-by-one. The list can be static or dynamic, depending on whether you want to enable the list to be refreshed. For example, you can save time manually adding prospects to your research list of prospects with more than one million in confirmed total assets and a high major giving capacity. When you set your research list criteria, enable the list to refresh automatically every night. Every day prospects who match your criteria are added to the list for you.

Not sure where to get started? After you have your constituents imported, open a pre-built research list. For example, you can open the "Assets > \$1 Million - Identified" research list. At the top of the Members grid, click the **Refresh** button. You can then see if any of your prospects match the criteria set up for you.

Want to learn the insides and out of research lists? We have a [guide all about research lists!](#)

Recommended Next Steps

To continue your education about the basics of **ResearchPoint**, we recommend you next review the following guides:

- If you integrate with the **Raiser's Edge**, review the [Set up Integration tutorial](#) and the [Raiser's Edge Integration guide](#).
- To learn how to effectively add prospects and begin the prospect research process for a constituent, review the [Prospect Research Search guide](#).
- To start tackling the more advanced topics in **ResearchPoint**, we recommend you review the [Query and Export guide](#), as well as the [Batch and Import guide](#).

Learn with ResearchPoint Training

All **ResearchPoint** users are able to take two introductory **ResearchPoint** training classes at no cost – *ResearchPoint: Introductory Essentials* and *ResearchPoint: Introduction to WealthPoint*. After you take the introductory classes, we offer 7 regular classes in three levels – Introductory, Intermediate, and Advanced.

To sign up, see the [ResearchPoint Learn class schedule](#). You can also watch a video on how to use [Training Central](#).

Overview of ResearchPoint Resources

Learning a new program can present both opportunities to enhance skills and frustrations when you encounter an error. No matter the situation, we're here to help. Use the chart below to determine which resource fits your need.

| Troubleshooting | How-to | Training & Services | Peer-to-Peer |
|--|--|--|--|
| <p>Knowledgebase</p> <ul style="list-style-type: none"> • Answers to software problems • Search here before you contact Customer support • For greater accuracy, filter results by product | <p>In-Product Tips & Help Panel</p> <ul style="list-style-type: none"> • Look for tips icon for helpful instructions • Use help icon in upper right corner of the page to access the ResearchPoint help | <p>Blackbaud Learn</p> <ul style="list-style-type: none"> • Free and paid training on common tasks • Annual subscriptions with access to instructor-led classes • Role-based curriculum • Strategy and best practice sessions | <p>Target Analytics Community</p> <ul style="list-style-type: none"> • Get answers to your questions from your peers • Discuss best practices with peers and Blackbaud experts • Latest product news • Provide feedback directly to ResearchPoint product development team |
| <p>Customer Support Chat</p> <ul style="list-style-type: none"> • Available: Mon-Thu 8:30am to 8:00pm and Fri 9:00am to 8:00pm • Instant message Support Analysts to troubleshoot your program questions | <p>ResearchPoint How-to Page</p> <ul style="list-style-type: none"> • User guides, tip sheets, release notes, and more • Access helpful how-to videos and information about the latest new features <p>Blackbaud Hosting Services How-to Page</p> <ul style="list-style-type: none"> • A resource page about your Blackbaud Hosting Services • Check the status of hosting | <p>Consulting</p> <ul style="list-style-type: none"> • Seasoned consultants provide 1:1 custom implementation consulting to help you develop effective strategies • Ensure your team fully utilizes data with your Target Analytics project • Contact Blackbaud Account Representative for pricing and packages | |

► To learn more about ResearchPoint How-to Documentation, visit: www.blackbaud.com/howto/ResearchPoint.