

Leveraging Your Account Manager

The Formula for a Genuine Partnership

One of the greatest assets at YourCause + Blackbaud is our talented and passionate Account Management Team. These are the indispensable CSR-matter-experts are prepared to serve as an extension of our clients' employee engagement team by providing strategic leadership, program management, and unabashed enthusiasm.

Communication

YourCause + Blackbaud Account Managers act as another member of clients' teams, providing tailored communication to fit each ones' needs.

With your Account Manager, you are able to:

- ✓ **Schedule strategic, recurring meetings** to get down to the nitty-gritty in your program, address what is going on, and ask all the questions you need to.
- ✓ **Quarterly and/or yearly program and campaign reviews** to make sure your programs are where you expect them to be and headed in the right direction.



94%

Of clients are satisfied with their account managers.

- ✓ **CSRconnect road map releases, information, and product change communication** so you always know what updates are coming with the platform.
- ✓ **Platform and end-user issue resolution** to make it as easy as possible for you and your employees to use the tool.



The Formula for a Genuine Partnership

- ✓ **Communication**
- ✓ **Consultation**
- ✓ **Product knowledge**

Consultation

A great program requires planning and information sharing. With a YourCause + Blackbaud Account Manager, you are equipped with consultative tools like:

- ✓ **End-user support, insights and trends** to help keep your program on track and meeting your metrics.
- ✓ **Numerous reporting features**, including standard data, custom data, and ad hoc reports.
- ✓ **Industry-leading annual reviews** compiled through data pulled from CSRconnect platform, showing year-over-year trends and more.
- ✓ **Strategy building and program planning assistance** including guidelines, matching requirements, communication planning, processing schedule, feature implementation, and more.
- ✓ Fellow Account Managers with knowledge and experience working with **over 400 active clients**.

To learn more about our Account Managers, visit yourcause.com.

[Learn more](#)

Platform Knowledge

YourCause + Blackbaud Account Managers are deeply involved in the creation, testing, and implementation of features within the CSRconnect platform. Our Account Managers provide focused support in areas such as:

- ✓ **Technical requirements** of the platform, your program, and what is needed to get your systems up and running and keep them going!
- ✓ **Expertise on site design**, shortcuts and quick tips, and all upgrades or changes that may come your way.
- ✓ **Quality assurance** is always a top priority to us. When we do our best, you do your best.
- ✓ Our platform has a ton of capabilities, so Account Managers are skilled in **site customizations and personalizations** so you don't miss any great features.
- ✓ Not only can Account Managers help **build and pull confusing reports**, but they can teach you so you are able to do more in the future.

96%

Of clients would recommend YourCause + Blackbaud.

Employee engagement programs are dynamic and ever-changing- They don't run on auto pilot. Our Account Managers are there with you, in the trenches and looking toward the bigger picture. This hands-on approach, mixed with their tools and training make them the perfect addition to your extended team.

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