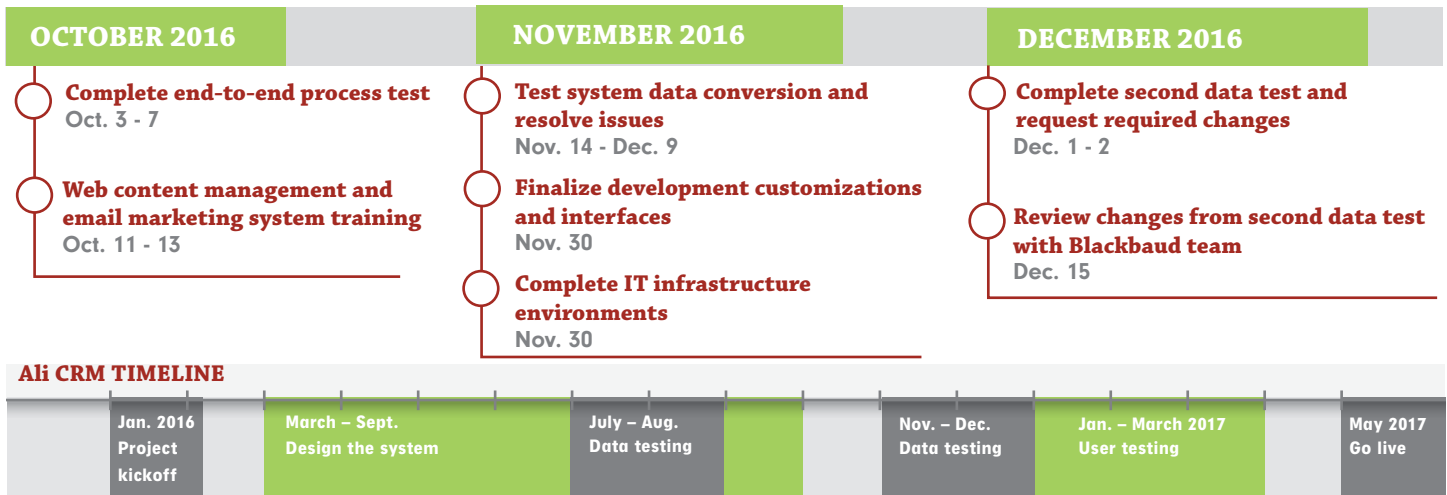


This newsletter keeps the university community informed about Ali, the university's advancement CRM system. The system is intended to be the single source of truth about alumni, donors and friends of the university. It was named for Aletheia, the Greek Goddess of Truth.

## KEY DATES



## INSIGHTS

### Ali CRM Passes its First Test

In early October, 50 university and foundation staff took the Ali CRM tool out for a spin through end-to-end testing. Teams from all aspects of advancement tested their daily work tasks on the new system. This first test was designed to learn what areas worked as planned and which may need modifications before the new system is final.

The large-scale, end-to-end testing brought work teams together for the first time. Some staff who will be working in Ali routinely logged into the system for the first time; others used this testing to become more familiar with the system's capabilities. Team members were able to see the connections in the system between one task and another. Team members could clearly identify how their work impacted the work of others and the importance of maintaining accurate and consistent data for all areas of advancement. Staff from across the university and foundation could see how one CRM system could be used across all advancement efforts and the benefit of sharing consistent constituent information.

By stepping through handoffs between various design areas of Ali, the team identified workflow gaps and areas of the system to improve. The gaps and challenges can be shared with the CRM development team to correct them before the system is complete. In addition, end-to-end testing was critical for reporting. Team members were able to see which information was a standard process within Ali, and which information may need to be collected through a report. Ali includes many new features for processing data within the system which will reduce the number of reports required. Through the testing process the teams produced a complete list of required reports and identified more accurately how they would be used.

Defining security roles and confidentiality is another activity of the Ali project. The end-to-end testing allowed staff to understand how the security roles are defined and see what system details will be visible to each security level. Work continues on defining confidentiality and security roles, and the lessons learned from end-to-end testing will help identify required changes in these areas.

The end-to-end testing indicated system areas that need more focus so work teams can continue to test and offer recommendations for the final product. It is also a starting point in testing the system, as the teams can now spend more time testing complex scenarios to ensure the complete Ali CRM can handle both everyday and complex advancement needs.

"Working through the complete end-to-end processes this early in the project timeline was a difficult task that required an enormous commitment from staff," explains Christina Provost, foundation CRM project manager. "However, it will be to our benefit by defining challenges and process flaws early enough that they can be corrected before the final system is delivered." This in-depth, end-to-end process validation is a newly added activity for CRM projects, Provost said. "Validating key cross functional processes is important to ensure Ali CRM is the ideal product for our university and foundation system to enhance all of our advancement efforts."



Meet the Blackbaud CRM Team

Several CRM experts from Blackbaud are working with our foundation and university team to make certain Ali is built to offer all features needed for university and foundation advancement efforts. Here’s your chance to learn more about our Blackbaud partners.



**Name:** Kristin Kramer  
**Title:** team lead

**Other CRM advancement projects I’ve worked on:**  
Santa Clara University, Dignity Health, The Salvation Army

**What I see as the biggest benefits gained by moving to an advancement CRM:**  
Both the Dignity Health and Salvation Army projects consisted of multiple databases spread across the country. They were able to consolidate the databases into one system and use the site structure so that each location only had the view of their data.

**What I love about my work:**  
I love being able to solve problems for a customer and give them a solution that meets their needs.

**How I spend my time when I'm not leading CRM solution teams:**  
I spend my time going to the park with my dogs and enjoying the wonderful restaurants in Charleston.

**Here’s something interesting about my trip to Nebraska to work on the Ali project:**  
On my second trip to Nebraska, we went to the shooting range, and I shot a gun for the first time.

**Ali earns accolades from Blackbaud team**  
The university and foundation’s advancement CRM project is at the halfway mark and continues to be praised by Blackbaud, the CRM solution provider. Christina Miller, Blackbaud’s senior project manager, said the Nebraska team working on Ali is far ahead of other clients at this stage.

“In our client project plans, we set an aggressive product design timeline expecting most teams will not meet the goals.” Miller said. “But the Ali team has not only achieved this expectation, they’ve surpassed it.” She explains the Nebraska team has taken ownership of the product, identifying business cases early. This allows key processes to be tested early resulting in a smoother implementation with fewer last-minute issues to resolve.

“The Ali project is concluding the design phase,” Miller said. This is always the most intensive portion of the project when work teams may not be comfortable with the progress. “But, as this group transitions to the test phase, they see the results of their efforts as their early engagement leads to fewer issues to resolve before Go Live.”

Miller shares that the Ali CRM team has moved beyond working through standard business practices to testing less frequent and more challenging work cases to ensure the program is designed for complex scenarios. This improves the end product and equips team leaders to work within the new system.

“Nebraska is a model team, setting a new standard for what an engaged group can accomplish in CRM implementation,” she said.

QUOTABLE

*“This month we completed end-to-end process validation; staff from each area of advancement tested Ali’s feasibility and learned how the work processes of each department interact. The project's next test environment will reflect the changes and improvements we’ve made so far and brings us one step closer to completing the CRM conversion successfully.”*

STEERING COMMITTEE

Teresa Brown, Foundation marketing and annual campaigns manager

TEAM MEMBERS AND REPRESENTED AREAS

**Brian Hastings**  
University of Nebraska Foundation  
brian.hastings@nufoundation.org

**Mike Bird**  
Foundation Development  
mike.bird@nufoundation.org

**Shelley Zaborowski**  
University of Nebraska Alumni Associations  
szaborowski@huskeralum.org

**Mark Askren**  
University of Nebraska Information Technology  
mark.askren@unl.edu

**Larry Hartley**  
Foundation Information Technology  
larry.hartley@nufoundation.org

**Dorothy Endacott**  
Foundation Marketing Communications  
dorothy.endacott@nufoundation.org

**Celeste Knapper**  
Foundation Finance  
celeste.knapper@nufoundation.org

**Connie Soucie**  
Foundation Talent, Culture and HR  
connie.soucie@nufoundation.org

**Ben Storck**  
Foundation Operations and Special Projects  
ben.storck@nufoundation.org

**Ben Kriegler**  
Foundation Research, Reporting and Analytics  
ben.kriegler@nufoundation.org