

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

NOVEMBER 2016	DECEMBER 2016	JANUARY 2016
<ul style="list-style-type: none"> Verify third data conversion and resolve issues Nov. 14 - Dec. 9 Finalize development customizations and interfaces Nov. 30 Complete IT production infrastructure environments Nov. 30 	<ul style="list-style-type: none"> Prepare for first round of user acceptance testing Dec. 1 - 30 Review changes from third data test with Blackbaud team Dec. 15 	<ul style="list-style-type: none"> Complete first round of user acceptance testing of all CRM systems Jan. 2 - 20 Provide final changes from user acceptance testing to Blackbaud team Jan. 23

Ali CRM TIMELINE

Jan. 2016 Project kickoff	March - Sept. Design the system	July - Aug. Data testing	Nov. - Dec. Data testing	Jan. - March 2017 User testing	May 2017 Go live
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INSIGHTS

Meet the Ali CRM Work Team

Designing a new advancement CRM for university, alumni association and foundation staff is no small task. To combine so many data records into one easy-to-use system requires the input of staff members representing a wide variety of roles. The Ali CRM work team is a dedicated group of over 50 staff members from across the university and foundation. This group has one goal: to design Ali CRM, ensuring the completed product is the best system for our needs.

The project is directed by a steering committee (found on page 2). Ali CRM is managed by these foundation staff: Christina Provost, project manager; Jessie Rader, test lead; Kathy Rauscher, business information lead; Cameron Oelke, technical lead; Stephanie Krebs, conversion lead; and Angie Taylor, trainer.

Each key area of the CRM has an identified design lead. The Ali CRM design leads are Stephanie Krebs, constituents and core principals; Ben Storck, Celeste Knapper and Megan Shada, revenue; Annie Bougger, event management; Lane White and Kerry Acker; prospect management; Alicia Haugen, donor relations and stewardship; Kristi Pease, marketing and communications; Teresa Brown, memberships; Christina Provost, internet email communication and event registrations; Larry Hartley and Christina Provost, administration and user security; and Kathy Rauscher, reporting.

Design leads are supported by over 40 subject matter experts; these users provide expertise in a specific area and assist with testing. Subject matter experts are from all university campuses, alumni associations, and the foundation. View the [list of staff](#) at on the Ali CRM website at nebraska.edu/ali.

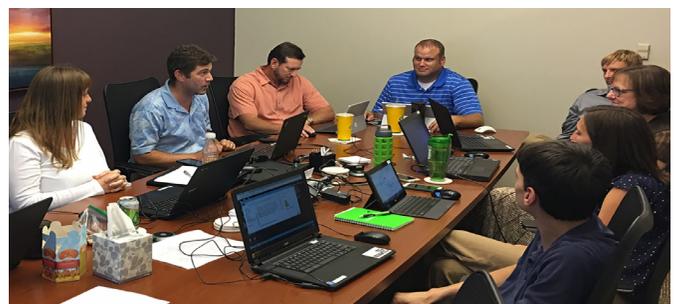
The project is also supported by technical staff

from the foundation and university's central administration. Ali CRM developers include Roxanne Paulsen, Cameron Oelke, Wes Juranek, Travis Heller, Erik Zoz, Alan Hald, and Dave Fosbinder. The server administrator is Kaj Stauffer and the database administrator is Terry Benes. Angie Nelson and Kim Metzger assist at the foundation's service desk.

This large Ali CRM work team is supported by dedicated project staff from Blackbaud, our CRM implementation vendor. The Blackbaud team has traveled to Nebraska several times and interacts with the work team daily.

In addition to the team currently involved in the CRM project, other development and prospect information staff will be trained to use Ali next month. Other staff members, including those who use NU Foundation Funds Online (NUFFO), will be trained. NUFFO moves to Ali CRM in May 2017. At that time, staff will access NUFFO through Ali. If you will be an Ali or NUFFO user, you will receive training and detailed documentation when Ali is launched.

Building Ali CRM is an immense undertaking, and the foundation and university have dedicated more than 14,000 hours by over 50 staff members to ensure the project is a success. If you have questions about how Ali CRM will improve your workflow, please send them to AliCRM@nufoundation.org.



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: Padgett Spencer

Title: business information/report writing consultant

Other CRM advancement projects I've worked on:

University of Illinois, Davidson College, Montclair State University, and other data warehouse implementations.

What I see as the biggest benefits gained by moving to an advancement CRM:

There are several benefits to implementing a CRM data warehouse including increased performance when generating complex reports and the ability to integrate aggregation and analysis in queries. Stored reports are available for users and this reduces the number of standalone reports, as information can be seamlessly integrated into a section, tab or dashboard page.

What I love about my work:

I love taking an organization's data and transforming it into usable and actionable information for the business users, managers and executives.

How I spend my time when I'm not leading CRM solution teams:

My passions outside of work are cycling, building and flying radio control (RC) helicopters and airplanes, and custom-building gaming computers.

ALI CRM

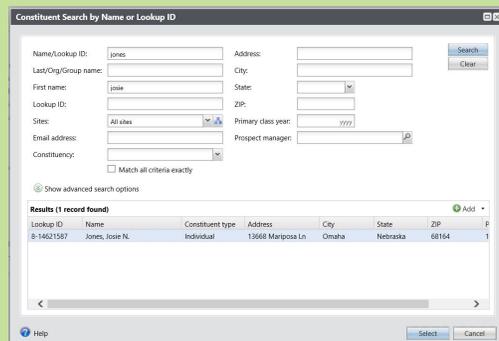
Single Source Of Truth

How to update biographical data in Ali

You learn that one of your contacts has a new phone number or has changed their job title. It's important information that should be shared with others supporting university and foundation advancement efforts, but as of now there isn't an easy way to share these details with others across the university and foundation. This is one reason why Ali CRM is being developed, and this new product will make updating biographical data on constituents a simple task.

To request a change of information, go to the constituent record to be updated. With one click, users can input the new information and the source of the update. By checking the box on the form, the request will be directed to a system information specialist to confirm the update. You will receive an email when the information has been verified and added to Ali CRM.

The updated information will be available to all users in real time. This process will ensure accuracy of all Ali CRM data and make certain that all users will have access to consistent and correct information. More details about this process will be shared in user training when Ali CRM is launched.



QUOTABLE

“The Ali plan includes significant training, based upon an individual’s job and security role. This means that all event planners will attend the same training, and development officers will attend a different training designed for their specific needs. Most training will happen within the two months before Ali is implemented in May 2017.”

Angie Taylor, Foundation technical trainer

STEERING COMMITTEE

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ALI questions or comments?

Send your feedback to AliCRM@nufoundation.org

