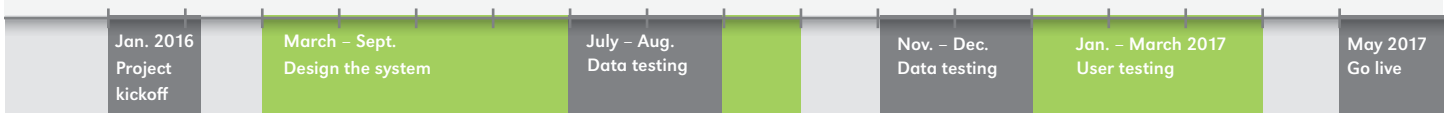


This newsletter keeps the university community informed about Ali, the university's advancement CRM system. The system is intended to be the single source of truth about alumni, donors and friends of the university. It was named for Aletheia, the Greek Goddess of Truth.

KEY DATES

| MARCH 2017 | APRIL 2017 | MAY 2017 |
|---|--|--|
| <ul style="list-style-type: none"> Complete second round user acceptance testing of all CRM features March 6 - 24 Provide final changes from user acceptance testing to Blackbaud team March 24 Plan to move data files to Ali CRM March 28 - 29 | <ul style="list-style-type: none"> Begin Ali CRM user training April 24 Enter final data in Raiser's Edge April 28 | <ul style="list-style-type: none"> Complete preconversion updates May 1-3 Run conversion process May 4 - 11 Planned first week of Ali CRM May 15 - 19 |

Ali CRM TIMELINE



INSIGHTS

Introducing Ali CRM training

Ali CRM will enhance work with alumni, donors and friends of the university. The program's features will offer opportunities to track and share data in new ways. To introduce university, alumni and foundation staff to the capabilities of Ali CRM, a complete training program will be implemented. The training will be coordinated by Angie Taylor, the foundation's technical trainer.

Most users will receive a basic training called Fundamentals before accessing Ali. These 30 introductory training sessions will be arranged in groups based upon the system needs of the users. Staff will learn the Ali features they will use to do their job. Fundamental training sessions will be in-person for foundation and alumni staff, and online training will be offered for campus partners. These fundamental sessions begin on April 24 and will continue through May. During fundamentals training, staff will also learn to protect the critical data in Ali CRM.

More detailed task trainings will be offered for those whose role is to work with prospective donors or manage events. These additional in-person training sessions are scheduled for May and June 2017. Task trainings will build upon the fundamental training information and educate attendees about using additional features in Ali.

More in-depth training about specific Ali CRM features will be offered to select staff beginning in fall 2017. These advanced features — such as adding hyperlinks to reports — will improve efficiency in complex advancement management tasks. In addition, as our CRM vendor adds new components that can be added to Ali, future in-depth trainings will be added to ensure staff are ready to use these new areas. Staff support for Ali CRM is not limited to these

training sessions. An online training library will be available to Ali users with helpful tip sheets and training documents. There will also be an option to reach out to technical support.

When NU Foundation Funds Online (NUFFO) moves to be part of Ali CRM in May 2017, NUFFO users will participate in online training to quickly learn to work in Ali with limited interruption. NUFFO users may also access Ali training and support materials.

The comprehensive Ali CRM training plan has been built with great care to ensure staff learn how to use Ali efficiently. As new staff join or user roles change, additional training will be available to ensure university and foundation teams continue to use Ali CRM to provide the best advancement services for alumni, donors and friends of the university. If you have questions about Ali CRM training, contact AliCRM@nufoundation.org.

| | | |
|--|--|--|
| BASIC TRAINING begins April 24 | FUNDAMENTALS <ul style="list-style-type: none"> • Training for all users • In groups by security role • In-person training for foundation and alumni staff • Online training for NUFFO users, campus partners | |
| | TASK TRAINING May and June | PROSPECT MANAGEMENT <ul style="list-style-type: none"> • Development teams • Development communications |
| IN-DEPTH TRAINING Fall 2017 | ADVANCED REPORTS | COMMUNICATIONS |
| | DEVELOPMENT PROCESS & POLICY TRAINING | VOLUNTEERS |
| | OTHER SESSIONS AS NEEDED | |

Meet the Ali CRM Team

Our foundation and university team is working to make certain Ali is built to offer all features needed for our advancement efforts. Here's your chance to learn more about our local partners.



Name: Angie Taylor

Title: technical trainer, foundation

My role in our CRM project:

I am responsible for identifying and meeting the learning needs of Ali CRM users including conducting in-person and online training sessions.

Other similar projects I've worked on:

I provided training to State of Nebraska employees on proprietary timekeeping software. I also provided MS Office training.

The benefits of implementing a CRM:

The key reason for Ali CRM implementation is about people. We want to provide the best possible experience for all constituents who support the mission of the University of Nebraska and to empower our advancement partners to be as successful as possible. To meet 2025 advancement agenda goals, we'll need to work in new and innovative ways, and Ali CRM is a powerful tool in meeting that goal.

How I spend my time when I'm not working on CRM:

After hours I'm a chauffeur for two youth who participate in lots of activities. I enjoy travel and dabbling in the arts including music, painting, drawing, and baking. I'm an avid reader, and the book I just finished is "Make it Stick: The Science of Successful Learning." I have two main life mottos: I try to learn something new every day, and I believe in miracles. By working together we can make them happen.

ALIA CRM

Single Source Of Truth

ALI CRM goes to work with real cases

In January, university and foundation staff tested the Ali CRM program with actual use cases during user acceptance testing. Teams from all advancement roles tested actual work tasks on the new system. This first test was designed to ensure Ali worked as planned and to learn which areas may need modifications before the new system is final. The team used 958 distinct test cases to test Ali over a period of 13 days.

"We learned a great deal through the first user acceptance testing," explained Jessie Rader, foundation director of prospect research analysis and Ali testing team lead. "It gave us a clear picture of where to focus efforts to improve Ali CRM before it is launched."

The test team tracked progress on each use case, noting necessary changes to the program and making suggestions for improvement. All of this data has been used to make alterations to Ali CRM before the second round of user acceptance testing takes place on March 6 - 24.

The team uses final test phases to evaluate detailed scenarios to ensure the complete Ali CRM can handle both everyday and complex advancement needs. Designing a CRM product that will function well for university, alumni and foundation advancement efforts has been a large undertaking, and these testing phases are critical to ensure Ali CRM is the highest quality product when it is unveiled in May.

QUOTABLE

"The move to Ali CRM will be great for both the foundation and the university. We can track so much more in events and in the member accounts. It is a one-stop-shop for information, which will help us improve our services to our members and donors moving forward."

Heather Rempe, Nebraska Alumni Association

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ALI questions or comments?

Send your feedback to AliCRM@nufoundation.org

ALIA CRM