



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

JUNE 2016	JULY 2016	AUGUST 2016
<ul style="list-style-type: none"> <li><b>Software Developer Training</b> June 13 - 17</li> <li><b>CRM Development for Prospect Management, Marketing, Stewardship and Memberships</b> June 13 - 24</li> </ul>	<ul style="list-style-type: none"> <li><b>CRM Development for Prospect Management, Marketing, Stewardship and Memberships Complete</b> July 22</li> <li><b>CRM security design sessions</b> July - Sept. 2016</li> </ul>	<ul style="list-style-type: none"> <li><b>Report Writing Training</b> Aug. 1 - 5</li> <li><b>Internet and Security Training</b> Aug. 8 - 19</li> <li><b>Second Data Conversion Test and Issue Resolution</b> Aug. 8 - 26</li> </ul>

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

**Let's Talk Ali CRM Security**

*The security and integrity of our data are two of the most important obligations alumni, donors, and friends have entrusted to the foundation, the university and alumni associations. Data systems everywhere are continuously at risk through unauthorized access. Role-based access is now the industry norm to protect information.*

**Q: What teams are working on Ali security and access? What issues are the teams addressing?**

**A:** Work groups are meeting to review who has access to the current database (Raiser's Edge) and ensure that all access is role-based. In other words, this will make sure that an employee's access to the database is limited to that employee's specific role. Most employees need access that is specific to their role; just a few people will require very broad access. To give just one example, the work group is determining who can make biographical changes to data — such as changing an address, an email or a phone number. Ensuring we have role-based access is an industry norm and will help lay the groundwork for providing access in Ali CRM. The deep dive into the Ali CRM security issues is scheduled for July 2016. In the meantime, meetings are being held to work on the broader issues of security, access and confidentiality. That group includes the foundation's General Counsel Keith Miles, the foundation's Chief Information Officer Larry Hartley, the university's General Counsel Joel Pedersen, and UNL's Chief Information Officer Mark Askren, among others.

**Q: How do public records laws affect Ali CRM?**

**A:** The service agreement between the foundation and the university states that the foundation owns and maintains data on gifts as well as the biographical information on donors and alumni. The foundation,

as a private corporation, is not subject to the public record law that affects the University of Nebraska. That law holds that information held by a state entity (such as a university) is considered a public record, and any citizen can request this public record information.

Moving from the foundation's current database (Raiser's Edge) to Ali CRM does not change the fact that the data is still owned by the foundation. The foundation considers the data a trade secret, or valuable business information that is not generally known and if it was known could be exploited by those who compete with us. The foundation will continue to keep the data confidential while working to provide role-based access to our partners at the university. This is one reason why university employees will be required to have a log in for Ali CRM that is separate from their university credentials.

**Q: How will we access Ali?**

**A:** Ali is a web-based product. Staff will go to the Ali URL to gain access to the log in page. Security certificates, an encrypted virtual padlock that allows a secure connection from a web server to a browser, will be used to protect the CRM. Two factor authentication will also be used. This extra layer of security will require both a username and password as well as an additional piece of information to ensure the identity of the user. This makes it harder for potential intruders to gain access to the system.

Access to information in Ali will be set by a staff member's role and job function. This will be based on the information needed for a specific user to perform his or her job function, and these levels will be defined in the CRM security and access meetings.

## IMPACT

### UNO CBA is banking on improved CRM

Strengthening relationships with alumni is good for business for UNO College of Business Administration. The new Ali CRM will offer improved connectivity with former students. Bill Swanson, executive director of the Executive MBA Program and Professional Management Education Programs at UNO, serves on the Ali project team and sees great opportunities for the the program to expand UNO's advancement efforts.

Swanson admits his college is in the infancy stages of serious advancement work, and that's why Ali matters so much. He explains that some of the group's programs do a great job of making connections, but the new CRM would move the process from manual spreadsheet tracking to a more automated system with shared data throughout departments.

"The best benefit will be having a systematic way to keep track of alumni and build relationships — creating value with those groups once they leave our college," Swanson explains.

A real-world example of how Ali would fit into UNO's CBA advancement plans comes from last year's MBA Program 40th anniversary. This two-day celebration included a pre-game gathering with a festive tailgate and live-stream event at Mammel Hall and a more formal dinner and dance at Champions Run. Both events drew more than 100 people and were well-received with alumni. But, the intense hours spent tracking alumni data and managing details would be simplified with a sophisticated CRM. The popularity of this program has led to a signature annual event, and Swanson hopes Ali can do some of the hard work for future programs.

"A CRM that offers an easy manner for our Executive MBA alumni to share information about their world — everything from promotions to job changes to relocations or retirements — that has the greatest value. We can show we care about them, and in turn they will have more opportunities to support the program," Swanson summarizes.

## QUOTABLE

***"We recently completed the first design sessions on constituents, gifts, fund management and events. We challenged each other to consider how CRM can execute the work of all potential users and to think beyond how we currently do things."***

Jessie Rader, University of Nebraska Foundation managing director of prospect research analysis, research reporting and analytics, and member of the Ali CRM project team

## STEERING COMMITTEE

### TEAM MEMBERS AND REPRESENTED AREAS

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# ALI CRM

Single Source Of Truth

### CRM time tracker

Did you know that since the Ali CRM project began in January 2016, staff from across the university, the foundation and alumni associations have already logged 5,215 hours planning, designing and testing the new CRM system? This critical project is a little more than one-third complete, and many more hours will be put in before the May 2017 go-live date of Ali CRM. Thanks to all staff putting in enormous amounts of hours to ensure that Ali becomes the single source of truth for advancement activities across the university system.



*The EMBA 40th anniversary gathering featured a casual tailgate and a formal banquet. Event planning and alumni outreach for this annual event will be enhanced with Ali CRM. Consistent contact with alumni will strengthen their connection and support.*

### ALI questions or comments?

Send your feedback to [AliCRM@nufoundation.org](mailto:AliCRM@nufoundation.org)

# ALI CRM