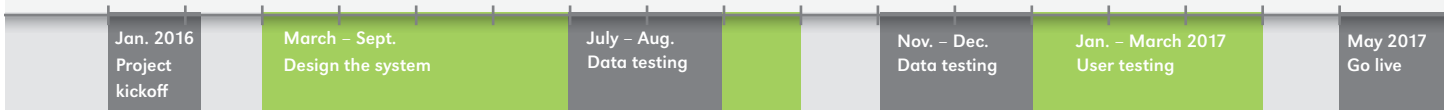This newsletter keeps the university community informed about Ali, the university's advancement CRM system. The system is intended to be the single source of truth about alumni, donors and friends of the university. It was named for Aletheia, the Greek Goddess of Truth.

KEY DATES

MAY 2017

First week of Ali CRM
May 15 - 19

Ali CRM support available at servicedesk@nufoundation.org
Beginning May 26 and ongoing

JUNE 2017

Begin Ali Tips & Tricks sessions
June 6

Begin events management training
June 26

JULY 2017

Monthly prospect management and events management training begins
July 10

Ali CRM new user sessions begin
July 13

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

INSIGHTS

Ali CRM is here

On May 15, Ali CRM was launched. Ali CRM is the *one source of truth* that allows the university, alumni associations and foundation staff to share critical information about each alumnus, donor and friend, ensuring that each of these individuals has the best possible experience with the University of Nebraska.

Ali CRM was an enormous 18-month project. A team of staff from the foundation, alumni associations, and the university worked together to ensure it would suit the university's needs. A three-year plan is now being devised to ensure this powerful new tool is used efficiently by the university, alumni associations and foundation staff and supports work toward the 2025 Advancement Agenda. This plan includes a focus on improving NU Foundation Funds Online (NUFFO) which is now part of Ali; improving fund management and reporting processes; and working to eliminate shadow databases used by advancement staff. Learn more about the future of Ali CRM on page 2.

Special thanks to all team members who worked on the Ali CRM project and to all staff who will continue to use Ali to raise funds, grow engagement and increase the bond our alumni and donors have with the University of Nebraska.

Building Ali CRM

400 employees participated in a contest to name Ali.

75 Ali team members from across the foundation, university and alumni associations dedicated more than 45,000 hours to the project.

More than 1,300 real business tasks were tested, and four data conversion test runs were completed before going live.

Countless reports, dashboard metrics, queries and data features were included to meet users' needs.

More than 30 staff members "wrote the book" on Ali CRM, creating detailed training manuals.

More than 52 Ali CRM training sessions have been held or are scheduled.

Ali brings together nearly 1.3 million records — all university alumni, donors and friends.

As Ali CRM is here, this is the *final issue* of this Ali CRM newsletter designed to keep you informed on the project. You will find additional Ali CRM resources and information at **nufoundation.org/ali** and also on the website's Training and Resource page link.

Have questions about Ali CRM?

Help is available if you have questions about Ali CRM. Look for details on the Resources and Training page listed on the **nufoundation.org/ali** main page. Use the Ali Fundamentals Jumpstart Training Manual as your first source of information. This manual, additional training resources and guides are available on the Training and Resource page. The training page search function makes it easy to find information. Additional videos and training materials are planned and will be added to the training resource library, so be sure to check the website frequently."

If the assistance you require is not available on the training and resource page, send an email to the service desk at **servicedesk@nufoundation. org** for Ali CRM assistance. It's important to reach out to the service desk with Ali questions that cannot be answered on the Training and Resource page. This communication allows the service desk to track questions and concerns to share critical information with other users. The service desk is the final destination for all Ali CRM inquiries, and will work with Ali CRM experts to ensure your questions are answered.

What's next for Ali CRM?

Now that Ali CRM is here, you may be wondering what's on the horizon for this project. Christina Provost, senior director of advancement CRM, will be leading efforts to expand and improve Ali CRM. The future for the program will be outlined in a three- year roadmap, currently being drafted with input from the foundation, alumni associations and campus project leaders. This overall plan will focus on how Ali CRM can be used most efficiently to reach 2025 advancement goals.

The foundation's data governance group will review and prioritize updates and changes to Ali CRM. With input from the foundation IT governance committee, the group will direct updates to ensure Ali CRM and the university's advancement data is continuously accurate, efficient and accessible.

A first step for identifying improvements will be to create an Ali CRM end user team to provide feedback and suggestions. In addition, all users attending Ali CRM Tips and Tricks sessions and other training programs will have an opportunity to provide input on increasing efficiency and usability of the program. The training team and the service desk team will track Ali CRM user questions and suggestions and provide feedback to be used for future imrpovements.

As work begins on defining the three year roadmap and organizing the end user team, very few additional updates will be added to Ali CRM. The Ali CRM committee learned from other university systems who implemented a CRM program to hold on changes until 'the dust settles' on our CRM project to ensure immediate changes will offer long-term solutions.

Adding new Ali CRM users

Now that Ali CRM is live, team members are developing processes and features for all users. In about six months, once that process is complete, new campus users will be added. Additional campus users will be added over time. For now, campus staff should use their current process for obtaining mailing lists. Next, users can prepare to move to Ali by updating

ΑΛΕΤΗΕΙΑ CRM
Single Source Of Truth

Ali CRM Training Update

As you adjust to working in Ali CRM, training sessions are available to offer support. The Ali Tips and Tricks session is a drop-in class for all Ali CRM and NUFFO users. This session is a great opportunity to learn more and get your questions answered. It's offered every other Tuesday from 9 to 11 a.m. at the Lincoln foundation office or via Zoom. Training for new users will be offered monthly. In addition, deep-dive training in prospect management and events management will also be offered every month. For training details, contact **training@nufoundation.org.**

For assistance anytime, online training materials are available at nufoundation.org/ali. The online library includes training videos and downloadable training manuals and reference guides. For new NUFFO users, on-demand training includes three videos plus a downloadable 26-page NUFFO resource guide. Additional videos and training materials will be added to the training resource library, so be sure to check the website frequently. *NUFFO users will continue to receive emails from the foundation with program information and updates.*

It's important that Ali CRM data is current and continually updated. If you have updated information on any university donor, alumnus or friend, please send it to systemsinformation@nufoundation.org.

The Ali CRM team will continue to update the program to ensure it provides accurate, accessible information to all advancement staff to improve interactions with university alumni, donors and friends.

"Launching Ali CRM was a starting point. We've learned from many peer institutions that it takes many months to return to normalcy in daily work. As we begin benefitting from the efficiencies of Ali CRM and the shared data, that's when we will see the real return on investment."

Ben Storck, NU Foundation assistant vice president, advancement services

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Ali questions or comments?
Send your feedback to AliCRM@nufoundation.org

ΑΛΙ CRM