

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

JULY 2016	AUGUST 2016	SEPTEMBER 2016
<ul style="list-style-type: none"> CRM development for prospect management, marketing, stewardship and memberships Complete July 22 System administration training and reports inventory July 25 - 29 	<ul style="list-style-type: none"> Report writing training Aug. 1 - 5 Configure system administration and user roles Aug. 8 - 26 Second data conversion test run complete Aug. 26 	<ul style="list-style-type: none"> Review files and correct issues with the second data conversion test Sept. 7-9 Online events, email, and memberships training Sept. 26-28

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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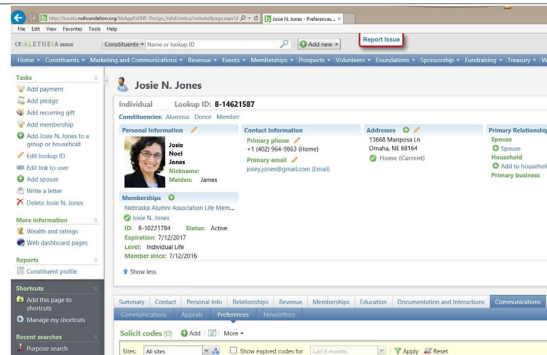
INSIGHTS

A Quick Look at Ali

After more 5,000 hours of work by staff members over six months, the Ali CRM product is beginning to take shape. There are many areas of the program yet to be defined – however, here's a quick look at Ali CRM and highlights of the new program.

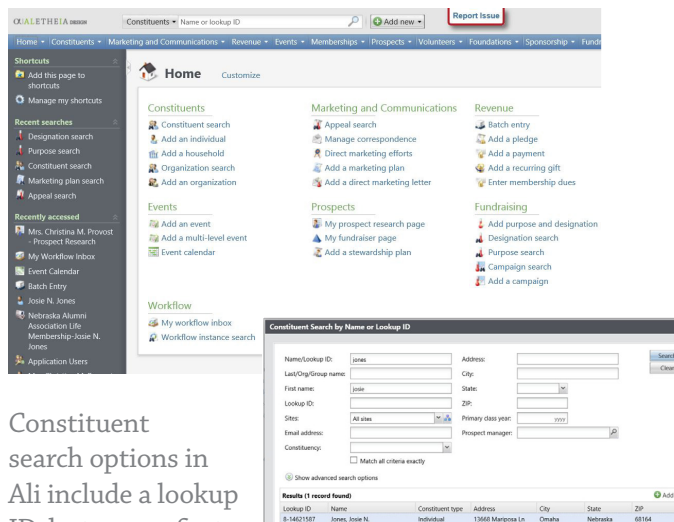
These images of Ali CRM are from the test environment, which means they will differ from the final product. Also, in the test environment all information tabs are visible to all users. In the completed CRM, the tabs each user will see will be based upon his or her specific role.

The blue menu bar across the top can be used to navigate functional areas. The areas visible will depend on each individual's user role. The gray explorer bar on the left side is an area personalized for each user. In this bar, users can create shortcuts and view recently opened searches or constituent files.

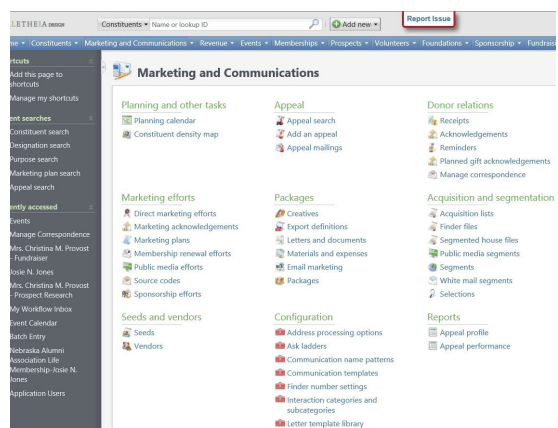


A constituent record in the Ali CRM program will have primary information on the top followed by summary tiles. The summary tiles can be added and edited. A summary tile will only be visible once there is information in that field. The summary tile header is a link. For example, clicking the "memberships" header will open the full membership information details on that constituent at the bottom of the page.

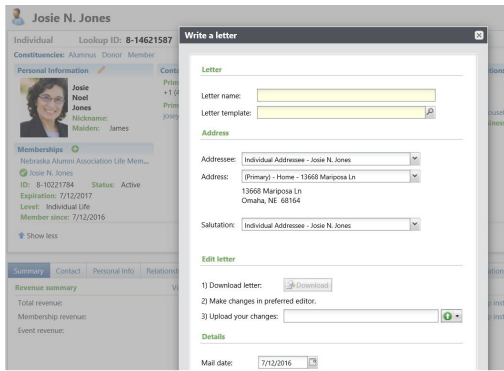
All tasks related to a key area such as marketing communications will be managed through a functional area tab. The marketing and communications functional area will organize appeals, marketing efforts, and other correspondence for all constituents.



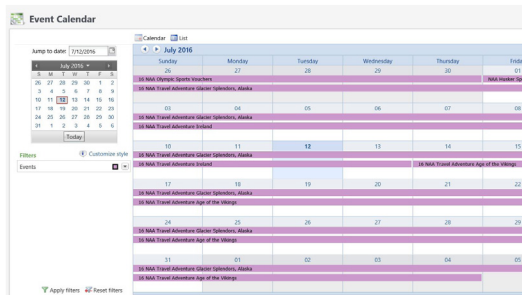
Constituent search options in Ali include a lookup ID, last name, first name and email address. There are also advanced search options that will help in finding a specific constituent in the CRM system.



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With Ali CRM, initiating communication with constituents is streamlined, with features for writing a letter and managing which promotional materials a constituent has received.



An easily-accessible event calendar will help advancement staff manage constituent outreach more effectively and open up opportunities to share university-related events that may be happening in a constituent's area.

Many people have asked for a video tour of the Ali CRM product. This video provides a high level overview of a constituent record in Ali and the advantages of a web-based system. The tour includes brief references to RE, which is the foundation's current database. View the video tour here: nebraska.edu/ali, under links go to [Ali CRM Introduction](#). If you have questions about Ali CRM, contact alicrm@nufoundation.org.

QUOTABLE

“Our entire development team will benefit from the prospect management functionality in CRM. Engagement plans, actions, and major gift requests will be interconnected. This will make prospect management information more efficient, accessible, and easier to understand.”

Lane White, University of Nebraska Foundation Managing Director,
Prospect Information Management

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The CRM work group is a partnership of foundation and university staff. Each member brings expertise on how their team will use advancement data in the new Ali CRM.

ALI questions or comments?

Send your feedback to AliCRM@nufoundation.org