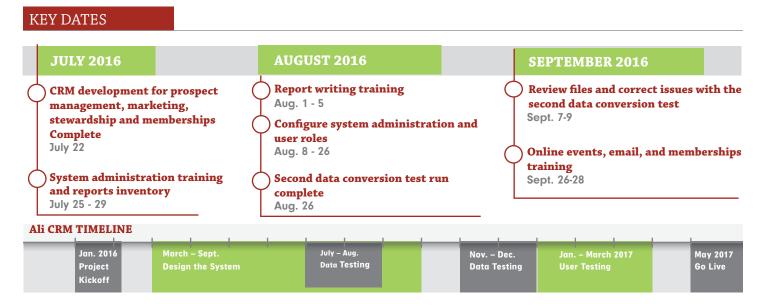
Nebraska

NEWSLETTER

CRM

ISSUE 4 7/25/2016

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.



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.

OUALETHEIA DEDON	Constituents - Name or lookup ID	Add new •	eport Issue	
	rketing and Communications • Revenue •	Events • Memberships • Prospects • Volunteers	 Foundations • Sponsorship • Func 	
Shortcuts Add this page to shortcuts	Home Customize			
Manage my shortcuts	Constituents	Marketing and Communications	Revenue	
	R. Constituent search	Appeal search	Batch entry	
L Designation search	Add an individual	Manage correspondence	Add a pledge	
🗼 Purpose search	ff Add a household	R Direct marketing efforts	Add a payment	
	R Organization search	a Add a marketing plan	😵 Add a recurring gift	
Marketing plan search	& Add an organization	langle Add a direct marketing letter	😵 Enter membership dues	
篳 Appeal search	Events	Prospects	Fundraising	
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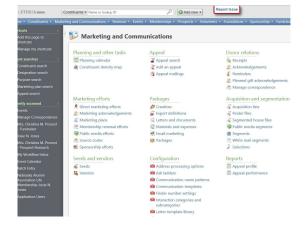
Ali include a lookup ID, last name, first

name and email address. There are also advanced search options that will help in finding a specific constituent in the CRM system.



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.

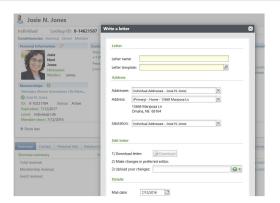
All tasks related to a key area such as marketing communications will be managed through a functional area tab. The marketing and communications functional area will organize appeals, marketing efforts, and other correspondence for all constituents.



continued on next page

 $^{\mathcal{D}}$ University of NebraskaFOUNDATION

nebraska.edu/ali



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

	Calendar 🛄 List						
Aump to date: 7/12/2015	Iuly 2016						
4 July 2016 + +	Sunday	Monday	Tuesday	Wednesday	Thursday	Frida	
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3 4 3 6 7 8 9	to MAA Travel Adventure Glacter Splendors, Alaska						
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	15 MAA Travel Adventure Age of the Visions						

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 <u>Ali CRM Introduction</u>. If you have questions about Ali CRM, contact alicrm@nufoundation.org.

CALETHEIACRM

Single Source Of Truth

What is a data test run?

Preparations for the second Ali CRM data test run began in July. What exactly does that mean? In a data test run, actual foundation and university advancement constituent records and other files from the current system are sent to the Ali CRM test environment. Then, the real fun begins as this test data is validated — or reviewed to ensure the data sent in the test is correct. Is the data in the right format? Did it transfer from a specific data field in the current system to the proper data field in Ali? Are all of the data fields showing up on the correct page in the correct order?

A data test run is like a theatrical dress-rehearsal. It can be used to make certain all of the parts are working together in the right way to ensure the opening night (or CRM Go Live in this case) is a success. With a complex project like Ali, there are several data test runs with each test getting closer to the final conversion run. Data test runs are planned early enough in the project to make certain there is still time to correct errors and test again. All of this extra work and extra care will make certain the university and foundation's new CRM product will be of the highest quality and function as needed for all staff.



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.

Prospect Information Management

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."

STEERING COMMITTEE

TEAM MEMBERS AND REPRESENTED AREAS Brian Hastings University of Nebraska Foundation brian.hastings@nufoundation.org Mike Bird Foundation Development

mike.bird@nufoundation.org **Shelley Zaborowski** University of Nebraska Alumni Associations

szaborowski@huskeralum.org **Mark Askren** University of Nebraska Information Technology mark.askren@unl.edu

Larry Hartley Foundation Information Technology larry.hartley@nufoundation.org **Dorothy Endacott** Foundation Marketing and Communications dorothy.endacott@nufoundation.org

Lane White, University of Nebraska Foundation Managing Director,

Celeste Knapper Foundation Finance celeste.knapper@nufoundation.org

Connie Soucie Foundation Talent, Culture & HR connie.soucie@nufoundation.org

Ben Storck Foundation Operations & Special Projects ben.storck@nufoundation.org

Ben Kriegler Foundation Research, Reporting & Analytics ben.kriegler@nufoundation.org

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

