

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

AUGUST 2016	SEPTEMBER 2016	OCTOBER 2016
<ul style="list-style-type: none"> <li><b>Report writing training</b> Aug. 1 - 5</li> <li><b>Configure system administration and user roles</b> Aug. 8 - 26</li> <li><b>Second data conversion test run complete</b> Aug. 26</li> </ul>	<ul style="list-style-type: none"> <li><b>Review files and correct issues with the second data conversion test</b> Sept. 2 - 30</li> <li><b>Online events, email, and memberships site reviews and testing</b> Sept. 6 - 23</li> </ul>	<ul style="list-style-type: none"> <li><b>Complete end-to-end process test</b> Oct. 3 - 7</li> <li><b>Web content management and email marketing system training</b> Oct. 11 - 13</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

**CRM Will Streamline Managing Prospects**

One of the largest components of the new Ali CRM system will be organizing data, plans, and processes involved in managing prospects and growing them into donors. Having an interconnected game plan that shows all details, touchpoints and future tasks for a specific prospect in one location will be invaluable for the foundation development team – and that’s exactly what Ali will offer.

Lane White, foundation managing director of prospect information management, can see the benefit the new Ali CRM will bring to the university’s advancement efforts. “Currently, three of the main components of our work are entirely separate from one another,” he explains. “Right now, important information on a donor can be split between multiple tabs: an engagement plan in one section, recent conversations in another and proposals in a third.”

The current setup makes it virtually impossible to create an all-encompassing plan that includes notes, documented contact and philanthropic discussions. Having that information in separate, unconnected locations makes organizing and tracking overarching next steps difficult.

The new CRM is designed to manage the overall plan with a prospect more efficiently. The process to enter updates will become more fluid and interconnected, automatically prompting development staff with the next task on a specific prospect’s plan. Development staff can easily complete tasks for a prospect and move forward on the outlined plan. Better organized data means all authorized staff will be able to easily check advancement plan progress with a specific prospect.

Ali’s capability to maintain a forward-looking plan, document tasks completed and send user reminders

for each step in the plan will be helpful for other areas of advancement as well.

For the prospect information management team, the challenge becomes compiling that information currently located in separate locations and ensuring it becomes formatted in a way that allows it to succinctly transfer to the new CRM. “With the help of our development staff, we’ll work through a mass cleanup,” White said. While a huge project, it will guarantee the best data is brought into the new CRM.”

The CRM team worked to develop the prospect management sections of Ali in July. White and the prospect management staff joined work group meetings to improve the prospect process in Ali. The prospect management process will be tested in the next CRM data test to ensure the sections are properly designed and working seamlessly when Ali is released.



**University and foundation staff come together in the CRM work group. Members bring expertise on how their team will use advancement data in Ali. Work group meetings discuss and define one specific area of the CRM, ensuring each information segment is correct and the final version of Ali will meet the needs of all users.**

### Meet the Blackbaud CRM Team

Several CRM experts from Blackbaud are working with our foundation and university team to make certain Ali is built to offer all features needed for university and foundation advancement efforts. Here's your chance to learn more about our Blackbaud partners.



**Name:** Kristin Romness

**Title:** CRM design and configuration lead

#### **Other CRM advancement projects I've worked on:**

University of Alabama, University of Central Florida, United States Naval Academy Foundation, University of Guelph (in Ontario, Canada).

#### **What I see as the biggest benefits gained by moving to an advancement CRM:**

Once a university has moved to a CRM, they find that they are able to do much more robust reporting, and everyday processes are made more efficient and streamlined. Although any change can be daunting, the results are well worth it in the end.

#### **What I enjoy doing when I'm not leading CRM teams:**

I recently moved to Chicago, so I love walking and exploring the city. I also love traveling, which is good since I spend a lot of time on the road, reading and cooking.

#### **Here's something interesting about my trip to Nebraska to work on the Ali project:**

So far, my favorite Nebraska trip was when Raney Allen (your technical account manager) and I went to Blue Blood Brewing Co. in Lincoln and did the cave tour. I can honestly say that's my first time ever in a cave, and it was amazing!

# Α|ALETHEIA CRM

Single Source Of Truth

#### **CRM Success for FSU Foundation**

Pamela Spencer, Florida State University Foundation's vice president for advancement services, saw great benefits when its organization's advancement efforts moved to a Blackbaud CRM.

"Converting to Blackbaud's CRM has given us a better overall view of our donors and prospects. It provides us with better prospect management tools for our fundraisers," Spencer explained. "The My Fundraiser page gives staff their to do list so none of our prospects fall through the cracks."

Spencer said the FSU Foundation can now document a more comprehensive prospect strategy for each major gift prospect, and managing those plans is not burdensome. "It is intuitive," she admits. "The CRM provides the prospect research and management staff tools to manage portfolios. It is easy to assign large numbers of prospects and easy to set up prospect plans." She continues, "We are able to make prospect lists available on smart phones for our fundraisers. When they are on the road and need to quickly fill an appointment, they have a list to consult right then and there."

One of the best features, Spencer explained, is the product's customizations. "What's more, we now can set up our security settings to be more granular and less of a one-size-fits-all. It allows us to customize the look, feel and use of the system to meet our specific needs and methods of operation," she said.

The Florida State University Foundation implemented its Blackbaud CRM in May 2015.

### QUOTABLE

***"Ali CRM will benefit our advancement staff throughout the university. To be competitive today, we need timely and secure access to more data and related analytics. A strong data-informed decision-making environment is essential to our success, and Ali will provide us with that platform."***

Mark Askren, Vice Chancellor for Information Technology and Chief Information Officer, University of Nebraska

### STEERING COMMITTEE

#### **TEAM MEMBERS AND REPRESENTED AREAS**

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#### **ALI questions or comments?**

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

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