

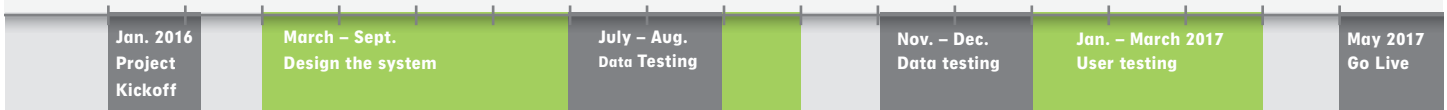


This newsletter keeps the university community informed about Ali, the university's advancement CRM system. The system is intended to be the single source of truth about alumni, donors and friends of the university. It was named for Aletheia, the Greek Goddess of Truth.

KEY DATES

SEPTEMBER 2016	OCTOBER 2016	NOVEMBER 2016
<ul style="list-style-type: none"> Review files and correct issues with the second data conversion test Sept. 2 - 30 Online events, email, and memberships site reviews and testing Sept. 6 - 23 	<ul style="list-style-type: none"> Complete end-to-end process test Oct. 3 - 7 Web content management and email marketing system training Oct. 11 - 13 	<ul style="list-style-type: none"> Test system data conversion and resolve issues Nov. 14 - 30 Finalize development customizations and interfaces Nov. 30 Complete IT infrastructure environments Nov. 30

Ali CRM TIMELINE



INSIGHTS

Ali CRM Glossary

As the university, alumni associations and foundation come together through use of a new and improved advancement system, we will also come together with one advancement vocabulary. Even for users of the existing database, Raiser's Edge (RE), some terminology will change in Ali CRM.

This glossary introduces some of the new Ali definitions and also indicates what these terms may have previously been called in RE. Some of Ali's terms are new because the program offers new capabilities. Here are a few terms; a complete glossary will be available when the new program is launched.

RE term	Ali term	How the term is used in Ali
Constituent ID	Lookup ID	The primary identifier for the constituent used by the organization.
Action	Interaction	Interactions are specific communication activities and actions taken to build a relationship or secure a donation from a constituent. Interactions can include meetings, telephone calls, email messages and mailings. Interactions can also be steps within a prospect plan.
Proposal	Plan Opportunity	Plan: strategy for how the fundraiser will secure the gift. Opportunity: a funding proposal or ask that is used to measure a solicitation.
Primary Solicitor	Prospect Manager	The prospect manager is responsible for the overall relationship with the prospect.
Fund	Purpose Designation	Purpose Designation is how specific funds and fundraising initiatives are grouped together; defines how the revenue received should be applied to fundraising purposes.
Gifts	Revenue	Any financial transaction, including commitments (recurring gifts and pledges) and payments (outright payment, recurring gift payment, pledge payments, event registration payment).

New Ali Function	How the function is used in Ali
Household Record	Household records allow you to view constituents who are married or life partners and their data collectively.
Committee Record	Committees allow you to group individuals and organizations so you can manage the group and for reporting purposes.
Recognition Programs	Recognition programs are used to track the requirements of giving societies and help identify those who have qualified. This has its own area on a constituent record, so this data will no longer be stored as attributes as it currently is stored in RE.
Mail Preferences	Allows constituents to indicate their preferred method and location to receive various types of mail. For example, a constituent could indicate she wants all event communication to go to her business address while leaving her home address as her preferred address.

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: Christina Miller

Title: senior project manager, delivery lead

Other CRM advancement projects I've worked on:

Santa Clara University, University of Alabama, Virginia Tech

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

My clients have greatly benefitted from that "360 degree" view of constituents. Development officers can see all the ways the donor is interacting with the organization, which builds strong relationships. Also, one client realized they were sending too much mail to a constituent group. They created a strategy that lowered the mail and increased the value in each mailing.

What I love about my work:

We have great people that are extremely skilled at what they do, but there are problems that not any one person can solve on their own. My favorite part is pulling together to come up with solutions to complex issues.

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

I have been blown away by all the great food. There are unique places with amazing food, offering exceptional cuisines from sushi to Indian, seafood to pizza, and of course, STEAKS! I'm a huge fan of seafood, and I was so pleasantly surprised to find great seafood in Nebraska.

ALI CRM

Single Source Of Truth

What's going on with NUFFO?

NU Foundation Funds Online (NUFFO), the current fund information and documentation software, will become part of Ali to allow users to access fund and constituent information in one system. Initially, Ali will have the same functions that exist in NUFFO, such as the ability to review fund activity and documentation, provide fund notes, request payments and transfers, and view donor information. Over time, enhancements such as electronic payment requests and searchable fund criteria will be added. In the coming weeks, foundation and university users will be surveyed to determine needs and priorities.

Reports Roundup

As work progresses on Ali, the work group is collecting and reviewing all reports currently produced from advancement data. Some of these reports will be replaced with updated features in Ali; others may be discontinued based upon limited use. Many reports will continue to be produced but may take on a more efficient form with consistent data. Full details about reporting functions in Ali will be shared during user training. Questions about specific reports can be sent to alicrm@nufoundation.org.

Upcoming CRM Testing

Ali end-to-end testing will be Oct. 3 - 7. This means staff will work in Ali to perform daily tasks, testing parts of the advancement data and fund process. They will document what works and provide a list of areas to update. Teams currently working on Ali will participate in testing, as well as a few additional key staff. Most users will not need to participate in this part of the test process.

QUOTABLE

"Ali CRM is the collaboration tool for managing all touchpoints with alumni, donors and friends of the university. We will be able to coordinate constituent related events, communications and interactions, while eliminating separate, isolated databases. To be most effective, it will require involvement and access across the entire university system."

Christina Provost, Foundation CRM project leader

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ALI questions or comments?

Send your feedback to AliCRM@nufoundation.org

ALI CRM