As communicated previously by University of Nebraska President Hank Bounds and University of Nebraska Foundation President and CEO Brian Hastings, the University is moving forward with an advancement CRM project. Our new CRM is named Ali, abbreviated from Aletheia - the Greek Goddess of Truth. Keeping you informed about this critical project is a priority, and this new monthly newsletter will provide updates as we identify, adapt and improve current business systems to create the new CRM.

The new advancement constituent management database, Ali, will be critical in the way the university and the foundation interacts with alumni, donors and friends. Because of this importance, building Ali is not a task to take lightly. Who would know best what components Ali must have to be successful -- those staff who will use the database. So, we gathered feedback with a January 2016 survey of CRM users from the foundation, alumni associations and university partners.

The valuable insights gathered from this survey will help outline the training, support and communication needs to make this product launch successful. In fact, this newsletter was created as a response to survey results.

For those who participated in the survey, thank you. Your responses have been heard and will guide this project. A snapshot of the survey results is included below. If you have additional feedback about Ali, please send it to AliCRM@nufoundation.org

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**Ali CRM TIMELINE**

**MARCH 2016**
- Ali Website Launch
- Create Ali Newsletter

**APRIL 2016**
- Review Business Processes Around Alumni, Donor and Friend Records; Gift Processing and Events (April 1-15)
- Web Page Inventory (Inventory and review current web pages, April 25)

**MAY / JUNE 2016**
- Change Requests Due for Alumni, Donor and Friend Records; Gift Processing and Events (May 15)
- Show CRM Tool to Project Team for Prospect Management, Marketing, Stewardship, & Memberships (May 31 - June 3)

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**INSIGHTS**

**CRM Survey Guides Work on Ali**

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**CRM Survey Snapshot - January 2016**

**Who We Asked**
139 respondents - from foundation, alumni associations, university partners

**What You Wanted**
- Integrated, user-friendly, quick, mobile-ready, efficient database system supported by the proper resources
- Lessons Learned from the Past
  - Planning – Clean data before conversion, prioritize tasks, written procedures
  - Decision-making – Solicit user opinions and feedback, decisions shared and discussed
  - Training – Better, efficient and ongoing
  - Timing – Take time to get it right

**Your Most Pressing Questions Now**
- Time – How much time to implement, will it make job more difficult
- Role – Will I be part of testing and launches, staff engaged in process
- Resources – IT support, training, changes in work
- Technical Issues – Current data transfer, campus interface, not too complicated
- Planning – Time to learn system, user participation, managing expectations

**A Successful Product Delivers**
- User-friendly – Better tracks donor/prospect characteristics, efficient and quick
- Accurate Data – Current, easy to convert, self-reporting, clean and precise
- Trusted Solution – Mobile, stable, used across campuses, functional
- Communication – Understandable timeline, explain impact to work
- Resources – Staff to support CRM, training, supervisor support, clearly defined roles
Team members recently conducted site visits at Florida State University and Ohio State University to see what they could learn from others who are using the Blackbaud CRM product and ask about their implementation. What they learned:

- Among the benefits those schools have seen is improvement in the coordination of mailings and events, and better access to information for college deans.

- Customization of the CRM product should be avoided if at all possible. Once the vendor (Blackbaud) upgrades its software, new functionality is added and then it’s a big job to convert any of the customizations that had been made. In some cases it has necessitated a school hire additional staff just to manage the customizations.

- The "design phase" is difficult because you are not familiar with the software product, yet you are designing how you want the product to work for you.

- Training is very important, especially for those ‘out in the field.’ It needs to be easy for staff to document interactions they have with alumni, donors and friends.

- Our timing is good. Many other schools have implemented the same product we have and we can learn from them.

- Other schools are importing data much more frequently than Nebraska; some as frequently as weekly.

**Q: Where did the name for our new advancement records management program come from, and what does the name represent?**

**A:** “Ali” is short for Aletheia, the Greek Goddess of Truth as our advancement CRM will become the one source of truth for all advancement efforts for the University of Nebraska. The name Aletheia was suggested by two UNMC employees as part of our naming contest. Tyler Scherr suggested the name of the ancient Greek goddess of truth Aletheia. Tyler admits that he submitted several names for consideration, but Aletheia was his favorite. Holly White came up with the name Aletheia in a similar way. She looked up the goddess of truth – the Roman goddess Veritas. Holly noticed that in Greek mythology, the name was Aletheia. Aletheia was shortened to “Ali” and our new CRM had a name.

**TEAM MEMBERS**

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**QUOTABLE**

“We surveyed our development officers after implementing the new system. 94% said the CRM met or exceeded their expectations.”  

Jeanne Pecha, VP of Advancement Services, at Florida State University Foundation, after implementing CRM

**ALI Questions or Comments?**  
Send your feedback to AliCRM@nufoundation.org