

JANUARY 30, 2024

Lunch and Learn

UNIVERSITY ADVANCEMENT TECHNOLOGY TRANSFORMATION



UC RIVERSIDE
BOLD HEARTS. BRILLIANT MINDS.

VISION



Key Outcomes

Future State

01 Sunset Disparate Systems

02 Implement a
Platform/Ecosystem

03 Embrace Enterprise Solutions

04 Master Data Management

05 Business Intelligence

06 Deliver Exceptional
Experiences



Strategic Imperatives

Guiding Principles

Transparency

To ensure transparency in our communications and relationship moves with alumni, donors, friends, and other external stakeholders of UCR

Collaboration

To enable better cross-campus collaboration, coordination, and strategic discussions

Enterprise Intelligence

To share content, data, and intelligence across the enterprise and leverage out of the box functionality from vendors

360-Degree Relationship Management

Modern, future proof UA technology stack



Unified CRM

Robust CRM that serves all constituencies across UA departments and allows for more dynamic, personalized relationship management.



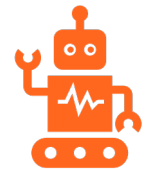
Native Data Integration

Natively exchange data between UA and Campus systems following best practices and aligned with agility, integration, and security needs.



Advanced Analytics

Advanced capabilities for descriptive, qualitative predictive, and prescriptive analytics; self-service tools, macro and micro views; internal statistical models; interactive dashboards, etc.



Efficiencies & Automation

Reduce manual work, centralize processes and workflows, embrace automation to allow UA staff to focus on higher level priorities

WHAT'S BEEN DONE

UC RIVERSIDE

BOLD HEARTS. BRILLIANT MINDS.



Progress

Forward Momentum

Salesforce

CRM Selection

Implementation Consultant Partner

Conversations with ITS Ongoing

Oracle Financials for the Foundation



Advancement CRM Selection Workgroup

Cross-Functional SMEs

Mai Vang, Lead

Lisa Wilson, Gift Administration

Ian Foster, Stewardship

Matt Heimdahl, Prospect Data Analytics

Kimberley Harvie, Prospect Moves Management

Dalyn Montgomery, Alumni Engagement Marketing/Analytics

Nesha Crossman, Unit-based Development

Crystal Sankey, Central-based Development

Iris Tam, CMT

Teri Eckman, Central ITS

Kim McDade, Executive Sponsor

Josh Carter, Executive Sponsor

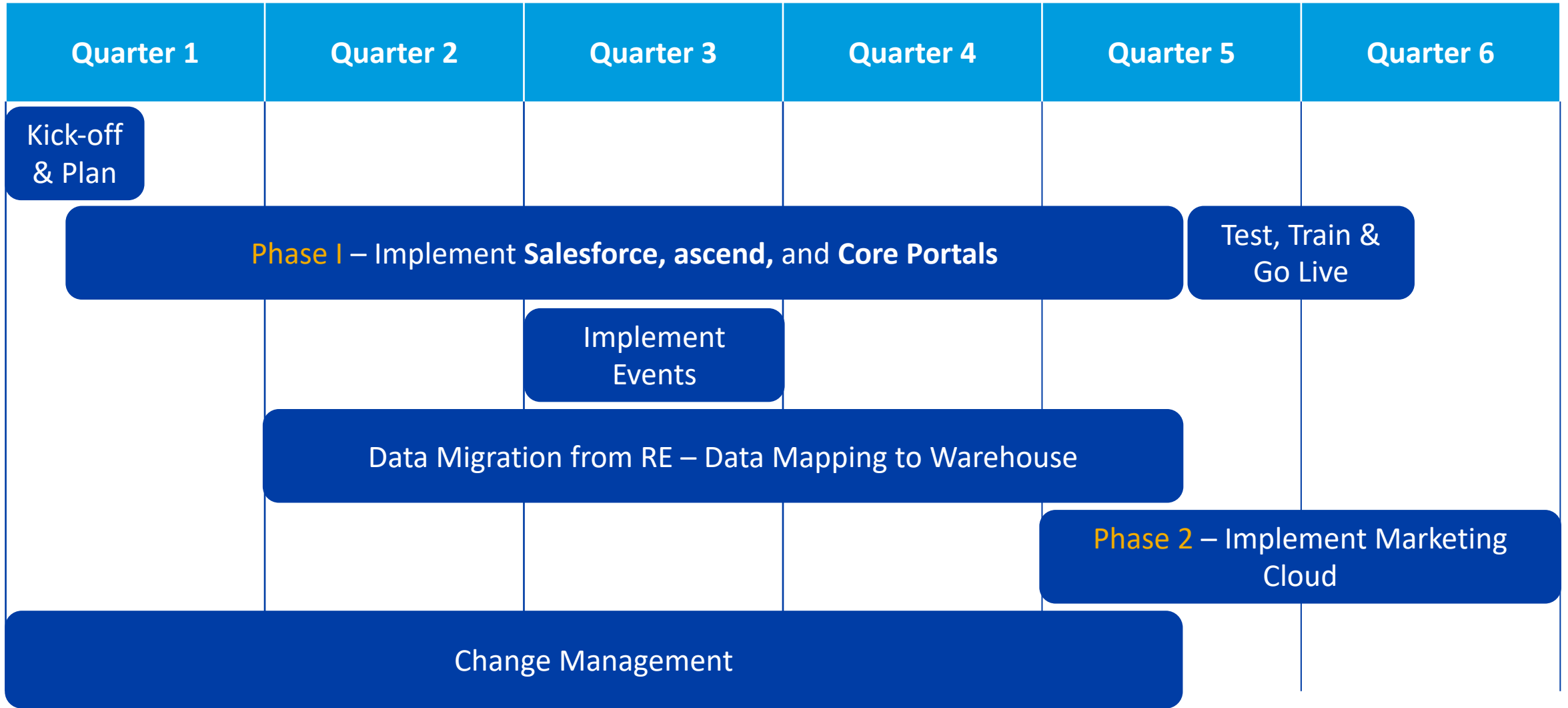
WHAT'S NEXT

UC RIVERSIDE

BOLD HEARTS. BRILLIANT MINDS.

Roadmap

High-Level Project Timeline





Data Governance Workgroup

Preparing for successful Salesforce and CRM Implementation

Workgroup will convene to:

- **Define and document UA Data fields**
- **Data preparation for migration**
- **Test data**
- **Develop business procedures for managing the data**

Workgroup will have representation from all University Advancement departments.



NEXT STEPS

- **Procurement finalizing agreements**
- **Secure Implementation Consultant Partner**
- **Implementation Consultant Partner to:**
 - **Outline timeline**
 - **Define workgroups, roles and expectations**
- **Change Ambassadors**
- **Interested in being on a workgroup or a change ambassador?
Let us know!**

QUESTIONS?