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**

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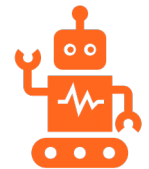
Efficiencies & Automation
Reduce manual work, centralize processes and workflows, embrace automation to allow UA staff to focus on higher level priorities

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Evaluate Entire Stack

Throughout this project, we will evaluate every UA technology tool to ensure it meets business objectives inline with this strategic landscape.

- Customer Relationship Management
- Content Management
- Email Marketing & Audience Segmentation
- Campaign Management
- Social Media
- Communities (alumni/donor portals)
- Stewardship
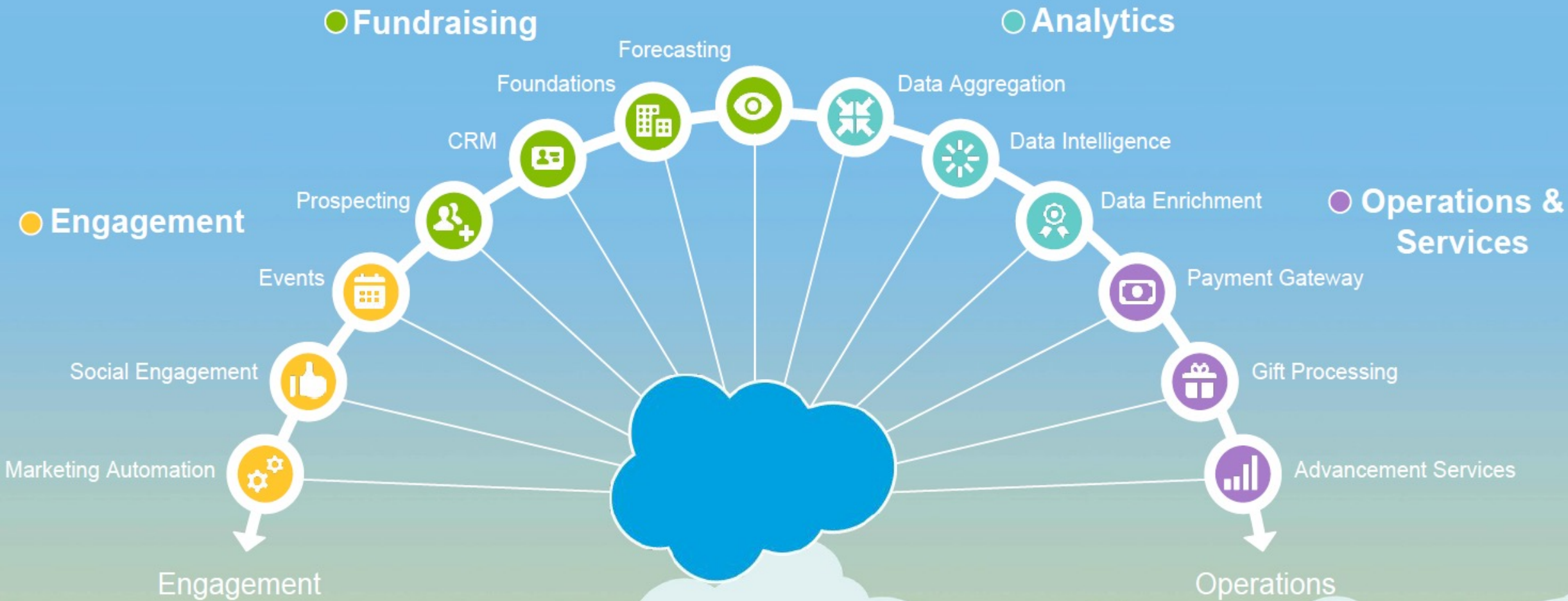- E-Commerce
- Analytics
- Digital Asset Management

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CURRENT LANDSCAPE

Current University Advancement Systems

SALESFORCE ECOSYSTEM

The Advancement Landscape

Fundraising

Analytics

Engagement

Operations & Services

Forecasting

Foundations

Data Aggregation

CRM

Data Intelligence

Prospecting

Data Enrichment

Events

Payment Gateway

Social Engagement

Gift Processing

Marketing Automation

Advancement Services

Engagement

Operations

salesforce.org

CENTRAL ITS PARTNERSHIP

Central ITS Partnership

- **Already have strong partnership**
  - Existing Collaboration
    - Server management
    - Data Warehouse Maintenance
    - JAMF

Looking Ahead

- Enterprise-wide solutions approach

- Campuswide master data management

- Leverage ITS resources available

Campuswide Master Data Management

- **Enterprise Data Strategy**
    - Establish effective campus data governance
    - Build a data management program
    - Create platforms to provide access
- **Key Data Principles**
    - Data owned by campus
    - Data is an asset
    - Data is a product
    - Data should be available
    - Data security and privacy
- **Strategic Goals**
    - Data governance
    - Data source discovery, prioritization, and integration
    - Data management program
    - Robust reporting, analytics, and artificial intelligence
    - Data security and privacy

WHAT'S BEEN DONE

Progress

Forward Momentum

UALT & ITS Leadership Meetings
Big picture vision, alignment, resourcing, and plan to execute.

Evaluated UA Technology Systems
Assessed each tool, reviewed contract terms, pricing, and potential next steps.

Draft Project Plan & Roadmap
Draft roadmap and plan to implement "UA Technology Transformation" by September 2025.

Broadening Team & Change Management
Developing work groups, rolling out plan to UA staff, eye on successful change management practices.

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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

Let them know if you have a pain point or feature you hope to see addressed in a new advancement CRM solution!

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WHAT'S AHEAD: PHASED WORK

Phased Implementation through Fall 2025

01 **Data Governance**

02 **UCR Foundation General Ledger**

03 **Core CRM**

04 **Payment Processors**

05 **Marketing Cloud**

06 **Event Management
Volunteer Management
Alumni/Donor Portal**
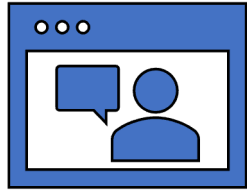
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Functional Workgroups

- **Workgroups will be created for each implementation**

- **Core CRM: Subgroups for CRM functional areas**

- **Active participation critical for success**

- **Interested in being on a workgroup? Let us know!**

NEXT STEPS

What's Next?

CRM Demonstrations

UCRF General Ledger

Bi-Monthly Lunch 'n Learns

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QUESTIONS?

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