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A forward-thinking approach to advancement

Using the right technology to increase efficiency, engagement, and communication

The University of Alabama at Birmingham (UAB) has long depended on its Office of Advancement to fulfill its mission of cultivating socially conscious global leaders and to drive institutional growth. To help further that goal, UAB's Office of Advancement has focused on the use of innovative technology to improve constituent engagement, including a commitment to leveraging business intelligence and analytics.

Understanding that data is one of the university's most valuable assets, IT and department leaders across the institution collaborated to ensure processes were put in place to support quality data entry, integrity, and meaningful data management. To accomplish this, the university elected to modernize its advancement database and integrate various solutions to gain a holistic view of alumni and donor activities and optimize fundraising initiatives.

Choosing technology to power advancement

To cultivate engagement that delivers the financial and community support necessary to fund the institution's strategic plan, UAB implemented Ellucian CRM Advance. "We want to make sure we're stewarding our donors and constituents and effectively communicating messages that resonate," says Michelle R. Hussey, assistant vice president for advancement services at the University of Alabama at Birmingham. "And that means we must have the right tools in place to be able to quickly get access to information."

Part of the appeal of the new system was its flexibility, and its ability to help UAB gather and dissect information that powers more effective advancement efforts. "We hoped to capture different types of data to support the segmentation necessary to encompass a multi-channel approach to constituents," says Hussey.

Main challenge

- Integrate data to gain a holistic view of alumni and donors

Solution

- Ellucian CRM Advance

Results

- Improved access to data, reporting, and analytics

- Enhanced ability to plan and execute fundraising intitiaves

- Improved engagement with constituents

And because today's donors, alumni, and constituents value a more personalized approach, having an integrated, data-driven solution was a top objective. "One of our goals was to be able to look at any constituent at any time, and see how they were touched from within our overall organization," says Hussey. "That's why the integration part is so important."

Managing change through implementation

UAB's previous advancement software had been in use for over a decade and posed multiple data quality concerns due to changes in (or lack of) process. To mitigate these challenges, the institution underwent extensive data quality efforts to ensure that redundant, missing, or duplicate data, or errors from historical data entry were identified and resolved prior to implementing the new system. These efforts provided a successful migration with virtually no data errors or duplicates.

During the implementation process, UAB's advancement team was equipped with fundamental training and dedicated resources to assist with questions and rollout. As a result, the institution had a near 100 percent adoption rate within the first few days of providing the team access to the new system.

Hussey believes that open communication was key to the success of the implementation. "There is no such thing as over communicating," she says. "Change is hard, so it's important to communicate the improvements users will experience. And it's equally important to partner with central IT so they are aware of what versions of software are required for data to be transferred between systems."

Improved insight, collaboration, and engagement

With Ellucian CRM Advance up and running, UAB is able to streamline operations and provide more effective constituent relations, including:

- Transparency and ease of access to data that fosters collaboration university-wide

- Improved alumni engagement through comprehensive data management, data quality, and constituent data management tools—enabling timely, personalized, and accurate outreach to alumni and community members

- Enhanced ability to plan with precision—UAB's business intelligence strategies supported by an integrated higher education technology ecosystem grants access to valuable, accurate information to inform fundraising forecasts, budgeting, and drive aggressive advancement goals across campus

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Using data to communicate more effectively

Ellucian CRM Advance is already paying dividends for UAB through easy access to data and reporting. The views and dashboards within the new system have helped the institution's Office of Advancement develop a clear understanding of data—and its potential impacts on fundraising efforts. "The activity feed on the individual and corporation records is more helpful than I could have imagined," says Hussey. "If we need more information about a constituent, we can look and see all of the team members and development officer activity in a summary view. And tracking impact reports is so much easier to view. The dashboard allows us to see proposals and stewardship plans being conducted in all of the schools on campus—this is really helpful to see everything in one place."

With new modern tools at their disposal, UAB's Office of Advancement is now looking at additional ways to engage with constituents, including partnerships with their recruiting team to host alumni events in areas where they are recruiting.

"With Ellucian CRM Advance, we can communicate more effectively with constituents and find out how well that communication was received," says Hussey. "We'll know what the result of that communication was and what their interests are. Yes, there were ways that we could do it before, but it was kept on four or five different forms or even siloed spreadsheets. Now we have all of that in one place."

Hussey notes that the new system has received positive feedback by the institutional advancement team. "Two weeks after go-live, I got an email from a development officer about the new system, saying 'Thank you so much, this is the best thing ever, thank you for making my life easier.' It has been very well received."

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