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Powering your fundraising programs

Questions to ask before you invest in a CRM

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In today's tough economic climate, advancement teams need to stay agile, meet constituent expectations, and make faster, more informed decisions in order to achieve their engagement and campaign goals. So it makes sense that constituent relationship management (CRM) solutions have gained widespread use. **But how do you decide which CRM is for you, and is your institution ready to make that change?**

Learn more about the key questions you should consider as you prepare your advancement team for successful CRM adoption.

Sharing data to enhance the constituent lifecycle

A greater understanding of constituent behavior across the institution promotes coordination and collaboration and creates a better experience for all involved.

Knowledge is power, and in this era of instant communication, so is speed. Too often, the insights you need to deliver a better constituent experience come too late. If important data resides in shadow databases, or key information is not accessible to the right people at the right time, taking appropriate and meaningful action is difficult.

Your constituents' lives are multifaceted, and so are their interactions with your institution. Understanding what your constituents need and want throughout their relationship with your institution is key when sending more meaningful, individualized communications. Communication needs to begin early, should deepen throughout the experience, and mature over the course of a lifetime. However, meeting those high expectations requires that the entire institution and advancement division work together, share information, and provide more clarity about how advancement programs are performing and the means to take appropriate action to change course, should you need to.

That's where a CRM solution can help. It's important to note, though, that CRM is more than just a database or software product. Rather, it's a comprehensive strategy supported by technology that helps you more effectively cultivate, engage, and manage relationships while building a strong culture of philanthropy. It is designed to unite your institution by breaking down silos and creating uniform workflows that result in a consistent experience throughout the full constituent lifecycle. A comprehensive approach with a CRM does this. And, because the right system can be configured to help you meet your goals and strategies, it evolves along with your changing needs.

Five questions to ask before you invest in a CRM

Before purchasing a CRM, you need to evaluate your options, understand what you need in a platform, and decide how to implement the software into your current processes. By asking a handful of key questions up front, institutions can choose a CRM system that provides effective relationship management throughout the entire donor lifecycle.

Should we choose a generic, all-purpose CRM or a higher education advancement-specific solution?

- **Should we choose a generic, all-purpose CRM or a higher education advancement-specific solution?**
- **How does the CRM integrate with our existing and future technology?**
- **Is the system configurable to our unique business processes?**
- **Why should we move to the cloud?**
- **How will we manage the change?**

1. Should we choose a generic all-purpose CRM or a higher education advancement-specific solution?

There are plenty of CRM platforms available today. However, after selecting an all-purpose CRM solution, you have to then invest the time, resources, and funding to add advancement-specific functionalities. From there you will need to:

- Add advancement-specific data fields and events
- Map fields to department business processes and workflows across advancement and the institution
- Integrate your customizations to your enterprise resource planning system and edit those customizations to be compatible with upgrades and changes

An advancement-specific higher education CRM is designed to address the complex and diverse needs of your advancement team—such as gift entry, multifaceted cultivation, stewardship workflows, and insights into prospects (for example, affinity and giving capacity). With time-saving tools that help staff focus on increasing engagement and philanthropy, the right solution supports adoption, utilization, and greater campaign returns.

Get all the capabilities you need and ease user adoption with a system designed for your advancement-specific needs. And be sure to select a technology partner who'll support your process from initial evaluation to go-live and beyond.

2. How does the CRM integrate with my existing and future technology?

Look for a CRM that will pull in data and act as a central hub for information and activity across applicable solutions. Think beyond existing systems and make sure that the CRM can provide the flexibility to remain viable for the future as your needs evolve.

The key is to select a technology partner who is dedicated to emerging trends in advancement technology and will support your process from initial evaluation to go-live and beyond.

Every higher education institution has its own unique set of technology solutions for advancement areas that often rely on related data. Imagine how you might do things differently if you could see all the important information you need, compiled in a unified view, and could share that information with others while tracking interactions with prospective donors and alumni on a regular basis.

This is how systems with an open architecture offer significant benefits: by enabling institutions to pull data into the CRM so that the CRM acts as the central hub for information and activity, resulting in time and resource savings over siloed systems.

Integration options with providers—such as communication, events, payment, wealth screening, and donation matching—can help ensure a smooth adoption for faster return on investment. Open architecture and application programming interfaces (APIs) allow your organization to have the flexibility to address your current needs while adapting to the ever-changing technology and fundraising landscape.

3. Is the system configurable to our unique business processes?

Your CRM implementation is an ideal time to take a fresh look at existing processes and introduce both streamlined business processes and software automation simultaneously.

Implementing the software alone is a missed opportunity. As you revisit your existing processes, take a hard look at what's working and what's not. Just because you've always done something a certain way doesn't mean it's effective.

During implementation, assess steps and workflows that can be cut or replaced with automation, such as importing gifts via API from your online giving portal, accessing wealth screening data which populates directly from the provider of your choice, and bringing in real-time event registrations and data updates from event software. Additionally, consider these steps to boost user adoption and decrease IT dependency:

- Set parameters and thresholds for universal processes such as engagement scoring, moves management, stewardship communications, gift agreements, proposals, volunteer management, reporting, and gift societies
- Preload and preconfigure the right fields, scripts, and data sets into the system to standardize data inputs and naming conventions
- Engage users to help you create the views and dashboards that are most useful to them without the use of custom coding

Finally, be sure to include the end-users throughout the implementation process. User engagement and buy-in is critical to the overall success of the implementation.

CRM implementation is an ideal time to review existing practices and introduce streamlined business processes with software automation. Select a CRM that will allow you to rebuild your business processes to enhance efficiency and accelerate adoption.

4. Why should we move to the cloud?

Historically, many schools have elected to deploy on-premise because of the greater control they believe it offers. But this approach requires more on-campus resources for systems maintenance and security. Institutions that move to the cloud, on the other hand, experience the benefits of enhanced scalability, business continuity, security, and application features—often while lowering their total cost of ownership. Why own, manage, modify, maintain, and support an application if you can get the latest and greatest offering on demand, while staying focused on your end goal?

Cloud is no longer “if” but “when” for most higher education institutions.

So what exactly is the cloud? Cloud computing means moving data and programs from local servers to the Internet, providing users with the ability to access and share information at any time, from multiple devices. Institutions that move to the cloud experience the benefits of enhanced scalability, business continuity, security, and application features—often while lowering their total cost of ownership. Access to CRM software via the cloud is through an online login portal. This allows staff members access via the device of their choice—desktop, laptop, tablet, or smartphone.

Moving to the cloud allows institutions to realize the full potential of their data to better inform strategic decisions while providing fewer barriers to progress and innovation. And for more and more users, the advantages are worth it.

Why own, manage, modify, and maintain an application if you can get the latest and greatest on-demand? Moving to the cloud will allow you to realize the full potential of your data to better inform strategic decisions, while removing barriers to progress and innovation.

5. How will we manage the change?

Many of the top issues affecting the success of CRM in higher education can be traced directly to poor planning, set up, or implementation. Another key barrier to success: resistance to change.

There's a mindset that "change" means abruptly shifting course and doing something differently. Change is often viewed negatively, so it needs to be managed well with effective change leadership.

Change leadership is a proactive approach based on a growth-oriented mindset. It's a way of thinking that empowers individuals and institutions to tackle changes, make the most of them, and create advantages from them.

As an important first step in change leadership, higher education leaders should adopt a mindset that anticipates change: it's inevitable, it's coming, it may be disruptive, but it also provides opportunities to thrive.

Before you undertake a CRM implementation, make sure you understand that strategy and technology go hand in hand. That means looking at the whole picture to ensure adoption, defining who owns the data, and understanding how the system will integrate with your existing systems to minimize negative effects on people and processes. The success of a CRM project often depends on employing positive change leadership strategies very early in the process—even before your team begins gathering data on user needs and comparing different systems.

Before implementing, define who owns which data, and understand how the CRM will integrate with your existing systems. The success of a CRM project often depends on employing positive change leadership strategies very early in the process.

CRM readiness scorecard: How prepared is your institution?

CRMs are powerful tools that can enhance staff productivity, improve constituent engagement, and increase giving. However, embracing new technologies and gaining the support needed to make the move can be daunting. How prepared is your institution?

Fill out our scorecard to get a general assessment of your institution's readiness to convert to a new CRM. The questions determine how prepared you are based on your institution's goals and the resources that you have available.

Gain an understanding of your CRM readiness based on your institution's goals and resources.

COMPLETE THE SCORECARD

CRM readiness scorecard

DIMENSION	SCALE 1 (Disagree) – 5 (Agree)				
The project's vision allows leaders and stakeholders to align toward the shared goal of a future state throughout the change initiative.	1	2	3	4	5
Leadership is engaged, agrees, and supports the project's vision and is committed to the project's success.	1	2	3	4	5
The project will receive extensive support and collaboration from functional groups across advancement to ensure success.	1	2	3	4	5
Our staff is open to a transformational change that includes changes to processes, people, structure, and culture.	1	2	3	4	5
We have very few projects that will occur at the same time that will impact any of the stakeholders necessary for this project.	1	2	3	4	5
The right people, time, and/or funding is aligned to ensure the project's success.	1	2	3	4	5
The CRM vendor has a good project delivery track record with expertise in higher education advancement.	1	2	3	4	5
TOTAL SCORE					

Score analysis

SCORE	SCALE 1 (Disagree) – 5 (Agree)
30-35	Congratulations! You're good to go.
20-29	A high score shows that the project has focused on aligning leaders, gaining their commitment and consensus, and the staff is willing to take on a change initiative. This score indicates that a great deal of structure exists to support the conversion.
11-19	A median score suggests that some structure and alignment exist. Still, there are additional activities that can and should be completed in order to ensure the conversion's success.
7-10	A low score indicates that the project needs to align leadership and focus on change management activities as there is no indication of existing support for the project.

Source: Modeled after Oregon State University Foundation's Organizational Readiness Scorecard, 2020

Shaping the future of CRM at your institution

Having the right tools to collect, analyze, and report data is essential. However, the key is establishing the critical process of sharing data throughout the institution and across donor lifecycle stages.

It is critical that you work with a partner who is not only an expert in CRM implementation, but also understands higher education advancement best practices. Choosing a partner with experience and expertise can help you harness the full power of the CRM system to radically improve processes, free up resources, and provide the insight you need to strengthen lifelong relationships with your constituencies and improve your campaign returns.

Achieving institutional goals with Ellucian CRM Advance

Build and grow a strong culture of philanthropy at your institution with Ellucian CRM Advance, a robust cloud-based solution that lets you track and manage donors throughout the lifecycle.

CRM Advance allows you to drive institutional outcomes by streamlining system integrations, user processes, and analytics while supporting development and engagement campaigns with configurations tailored for higher education advancement. By incorporating data-backed insights into your advancement strategies, you can enhance your fundraising efforts to reach institutional goals while cultivating and maintaining stronger relationships with your constituencies.

Passing the test with Ellucian CRM Advance

Designed for higher ed advancement

Ellucian CRM Advance is tailor-made to simplify the challenges of complex gift giving, donor prospecting, and constituent relationship management at higher education institutions and related foundations. Ellucian CRM Advance pulls your data together to give you real-time insights across departments, helping you streamline your engagement efforts and source new potential donors.

Connected with leading providers

Every fundraising operation is unique, requiring different levels and types of supporting integrations. That's why we built the industry's leading network: to support all your campaign and advancement goals. Ellucian CRM Advance can connect to relevant data from virtually any third-party system to assist with your event management, ticketing, wealth screenings, and more.

Built to grow business capacity

With Ellucian CRM Advance, you have the flexibility to rebuild and configure the way you advance constituents through the fundraising cycle to amplify and streamline business processes. Take advantage of modern advancement technology best practices that maximize fundraiser efficiency by delivering persona-driven views, automating workflows, and concentrating on the right constituents, at the right time.

Powered by the cloud

Ellucian CRM Advance was designed and built in the cloud. Moving your advancement operations to the cloud is the best way to achieve maximum efficiency and effectiveness for your campaigns. Powered by Amazon Web Services, Ellucian's global cloud provider, Ellucian CRM Advance provides the optimal balance of mobility, agility, and scalability advancement offices require for future growth and engagement.

Delivered by experts

Our dedicated team of consultants will help you assess your people, processes, and technologies through a common purpose, meaningful implementation strategy, and demonstratable ROI. And with our recommended change leadership strategies, workshops, tools, and ongoing learning opportunities, you will empower end-user adoption and long-term satisfaction of Ellucian CRM Advance through implementation and beyond.

Visit us at ellucian.com/crm-advance to learn how we can help your institution improve constituent engagement, campaign performance, and fundraising outcomes.

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Ellucian is the market leader charting the digital future of higher education with a portfolio of cloud-ready technology solutions and services. From student recruitment to workforce analytics; from fundraising opportunities to alumni engagement; Ellucian's comprehensive suite of data-rich tools gives colleges and universities the information they need to lead with confidence.

Working with a community of more than 2,700 customers in over 50 countries, Ellucian keeps innovating as higher education keeps evolving. Drawing on its comprehensive higher education business acumen and suite of services, Ellucian guides its customers through manageable, sustainable digital transformation—so that every type of institution and student can thrive in today's fast-changing landscape. To find out what's next in higher education solutions and services, visit Ellucian at www.ellucian.com.

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