Building relationships for a lifetime

Ellucian CRM Advance

Presenters

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About Us

Staff

Lindsey Bogner

Executive Director of Institutional Advancement

Donna McCormick

Foundation Business & Accounting Specialist

Amy Wheeler

Administrative Assistant

Systems in Place

Banner Advancement (1994)

Banner Advancement Self-Service (2001)

Scholarship Universe (2021)

Other Banner Modules Used: Finance and Accounts Receivable, Student, Financial Aid, HR

Greater Giving (2012)

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Background to Decision

Critical Issue

Our ability to increase the engagement and philanthropic support of alumni, friends, and organizational partners is hampered by inefficient use of staff members' time, business process constraints, and inability to effectively use our data.

Background to Decision

Current Situation

– **Banner Advancement is being phased out.** An official date has not been announced yet, but extremely limited support for the product is available.

– **Reliance on manual effort for daily tasks and donor management.** Relevant data exists in Banner Advancement, but it's not accessible due to system design and lack of training/support.

– **Communication channels are cut off in the software system and cannot be fixed.** We can't effectively communicate with donors and have to maintain duplicate records outside of Banner.

Background to Decision

Capabilities Needed

– Consolidated, comprehensive constituent records: persons and organizations, relationships, engagements

– Built-in business logic and process automation - especially for acknowledgement letters, year-end tax receipts, and reports

– Built-in mechanisms to keep the advancement area in sync with other College systems: Banner Student, HR, finance, Financial Aid

– Event management and campaign management

– Visualizations, dashboards, ad hoc reporting

Background to Decision

Desired Outcomes

– Reclaim staff time

– Unlock our data

– Achieve fundraising and engagement goals

– Integrate seamlessly with Banner Student, HR, Finance, and Financial Aid

– Make system-wide changes to ensure compliance with regulations

– Make data-driven decisions about fundraising efforts

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Implementation Process

Sample CRM Advance Implementation Timeline
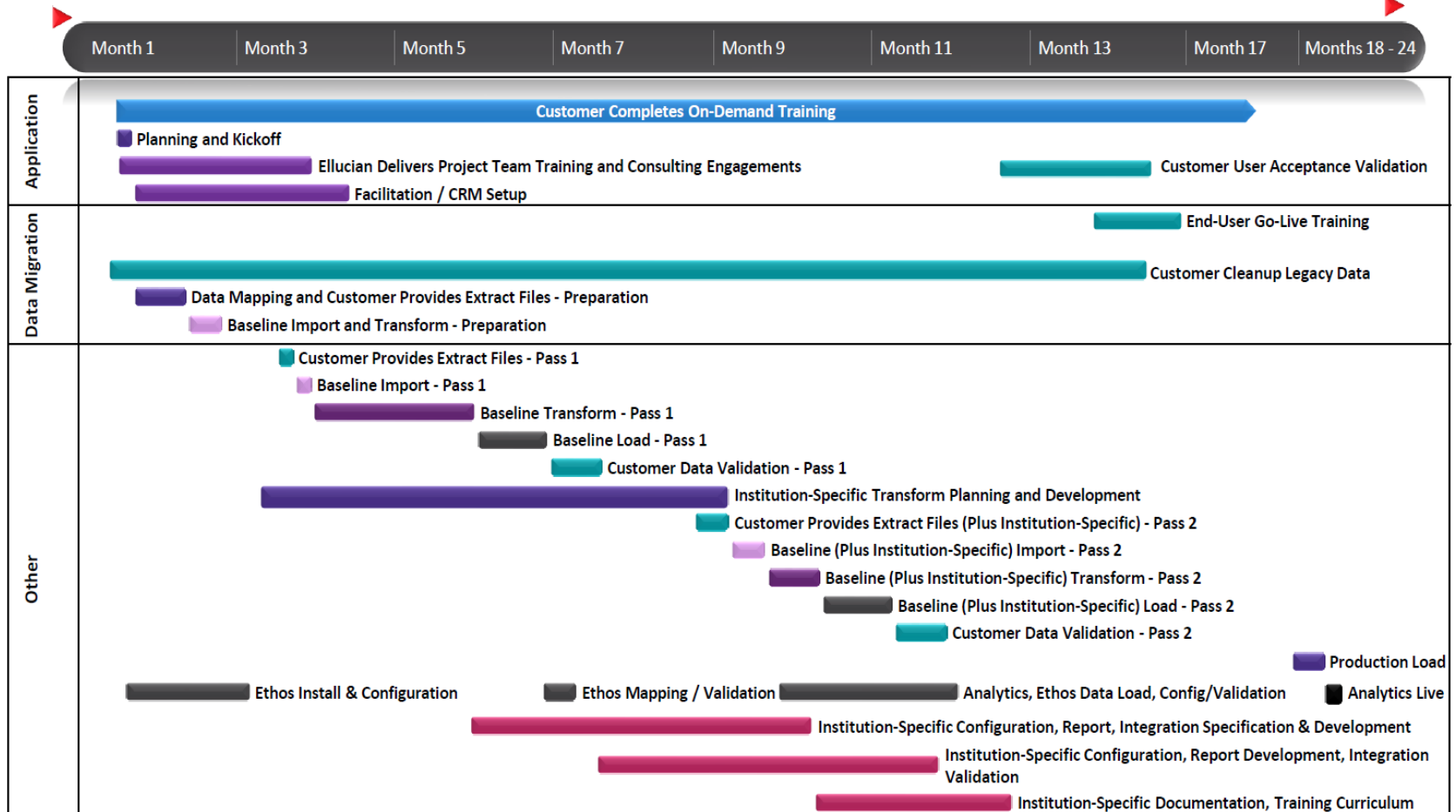
Implementation Process

Data Cleanse and Organization

During the implementation process we will do a data cleanse to help make sure we have quality data going into the new system and organize the data so all information is in one centralized system, instead of in multiple file locations or on paper.

Ellucian Product Advantage

CRM Advance is another Ellucian product so the transfer of data/information should be a smooth transition.

Connection (integration pieces) to other Ellucian products works seamlessly into our other Banner products across the College.

Pricing and Cost

No Duplicate Costs

We don't have to pay for Banner Advancement along with CRM Advance costs at the same time even though we will be running them concurrently during our implementation phase.

Bulk Hour Purchase

During the implementation process, we sign a contract for a bulk of hours, however we only pay for the hours we use.

- Barton would be invoiced after the hours are consumed

- If we finish the project early, we do not have to pay for the remaining hours we didn't utilize

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Pricing and Cost

Training Included

The price includes training, provided by Ellucian and custom-built around our business practices.

- Foundation staff focus the training, based on best practices and CRM setup customized to our activities and functions

- Set up of critical business and donor relationship management functions are built into training

- Training included integration with other College processes to ensure seamless integration

See Ellucian document.

Summary

Board Recommendation

We recommend that the Board approve the CRM Advance Contract that is presented in order for the College to strengthen fundraising and relationship-building outcomes.

Questions or Comments?