

***Improving The Advancement
Function Through
Integrated Constituent Relationship
Management***

As of: Fall, 2007



People. Process. Progress.™

TSI – Transforming Solutions, Inc.

www.transforming.com

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TSI Introduction

TSI leads organizations in solving the **people, process and technology** issues that impede their ability to adapt to change and successfully execute their strategic vision.

TSI has completed a number of engagements in Higher Education, ranging from:

- Strategic Planning
- Advancement Strategy and Process Improvement
- Financial and Student Services process improvement
- Software Selection and Implementation Project Management.

TSI also partners with other premier consulting firms including Chicago Business Intelligence Group. CBIG specializes in the full continuum of services relating to the planning and implementation of **CRM, data warehousing and business intelligence** applications.

TSI is an independent, objective consulting firm and does not have financial ties with software vendors.

Advancement and CRM Defined

The term “**Advancement**” has meant many things over the years. Initially it referred to fund raising and gift tracking on an **ex post facto** basis. This function was often conducted in a variety of ways by various entities within an institution.

Today, “**Advancement**” has become to mean the integrated and proactive managing of relationships with many different Constituents who are engaged with the University in many ways to deliver value to the institution, its mission, staff, students and finances. It includes the ability to change in the face of influences from the economy, politics, events and other factors.

CRM is an acronym that originated in private industry as “Customer Relationship Management” and which in the university context refers to “**Constituent Relationship Management.**”

Higher Education Trends

- Costs continuing to increase
- State funding continually reduced
- Increasing resistance to rising tuition and room & board costs
- Global competition and international constituencies
- Increasingly more complex relationships with multiple constituents who expect to be engaged with the University in a more sophisticated way
- Paradigm and culture change: Traditional Model vs. the New World; Alumni, Donors, Foundations, Government Agencies, Corporations... that demand personalization with seamless integration across constituencies
- Blurring the CRM Lines: Colleges, Units, AA, On-Line Learning, Foundations... similar needs and objectives and all competing for the same resources
- Greater demand for research, corporate and community involvement
- Very few good examples of best CRM practices in higher education.

The Challenges/Pains

How should the University Advancement function Operate across Campuses, Colleges, Departments....?

How Can We Update Alumni Records Once and In a Timely Manner?

How Do I Create A Target List?

How Can We Personalize How We Interact With Our Constituents?

How Can We Share Data? What is the "Single Source of Truth?"

Who Responded To The Email?

360?

How Rich and Robust Is Our Data? How Do We Track Our Complex Relationships?

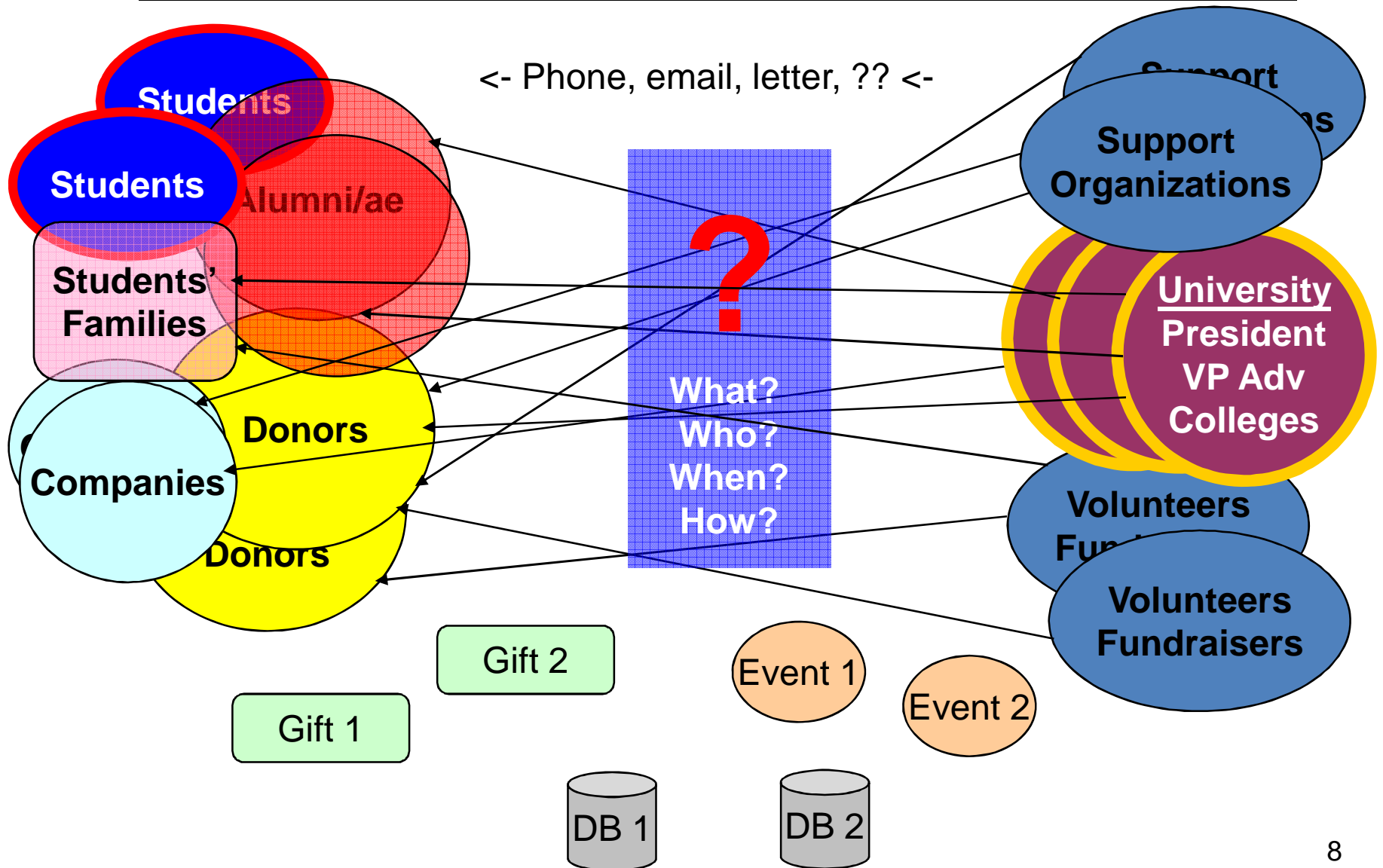
How Easy Is It for Our Constituents To Interact With Us?

- Volunteer
- Recruit
- Give
- Explore Partnerships
- Interact with Administration
- Interact with Professors
- Have a multi-faceted relationship?

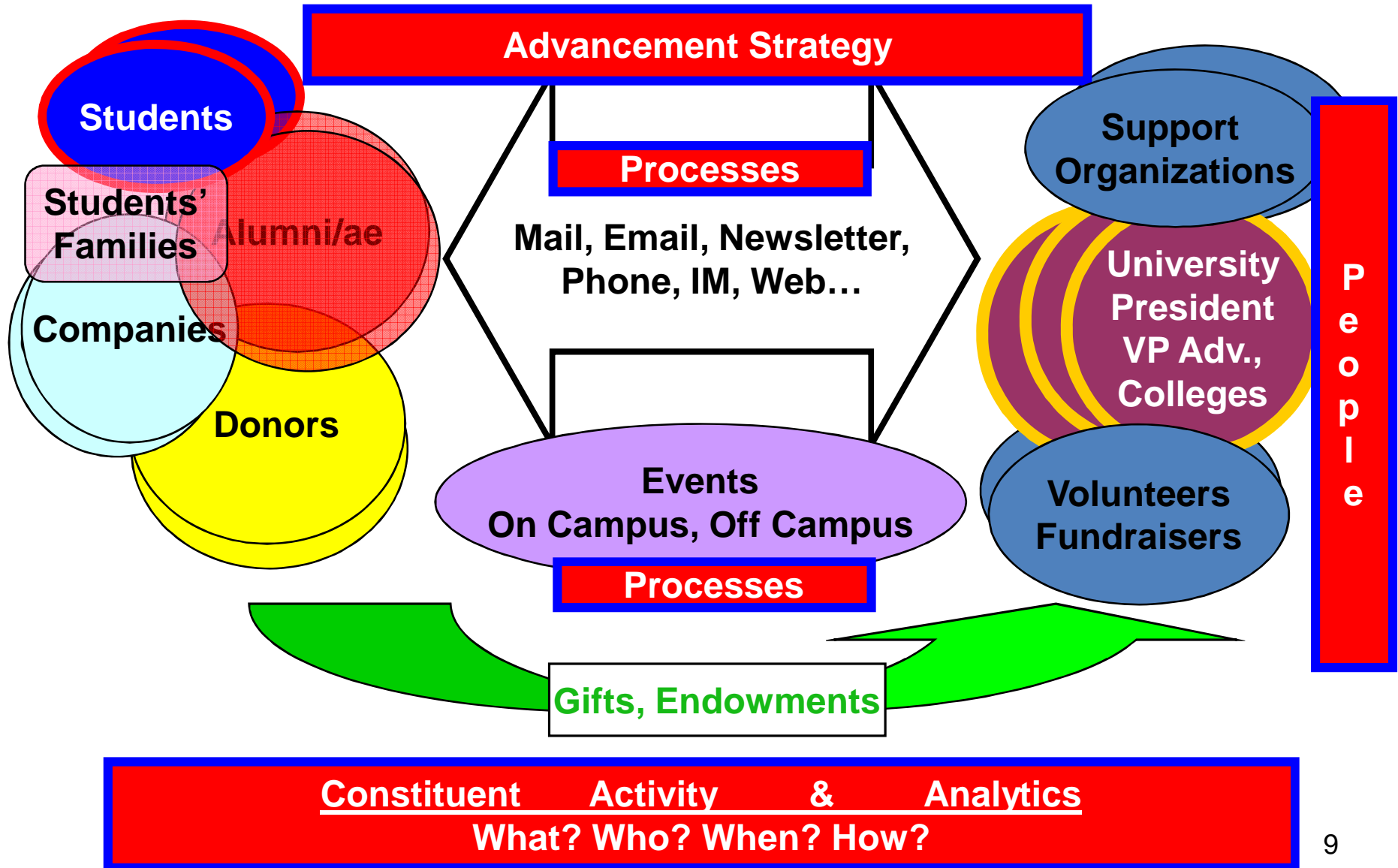
The Impact

- Missing many advancement opportunities:
 - Limited ability to harvest the “gold” in the information
 - Little workflow and process-centric approach – we burden those giving us their time, talent and resources with our bureaucratic policies, systems and processes
 - Missing volunteer engagement opportunities
 - Cannot capitalize on recruiting faculty and administrative staff
- Frustrating constituents by looking and acting more like a bureaucracy than an affinity organization that strives to remain in good contact with them
- Falling short on meeting the University’s Advancement Goals

How Does Today Look?



Potential Solution Overview



Closing the Gap

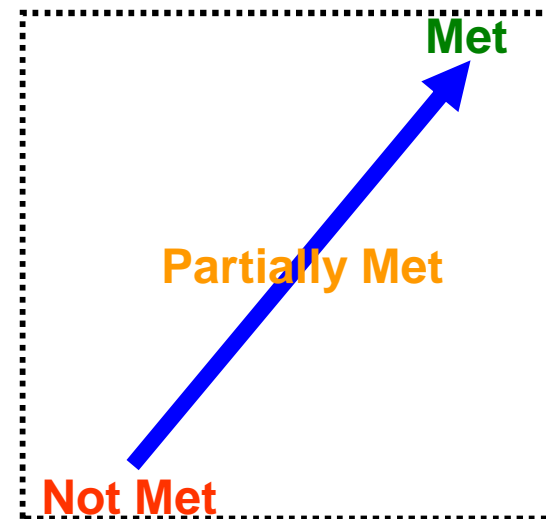
Gap Assessments of :

Advancement Operations

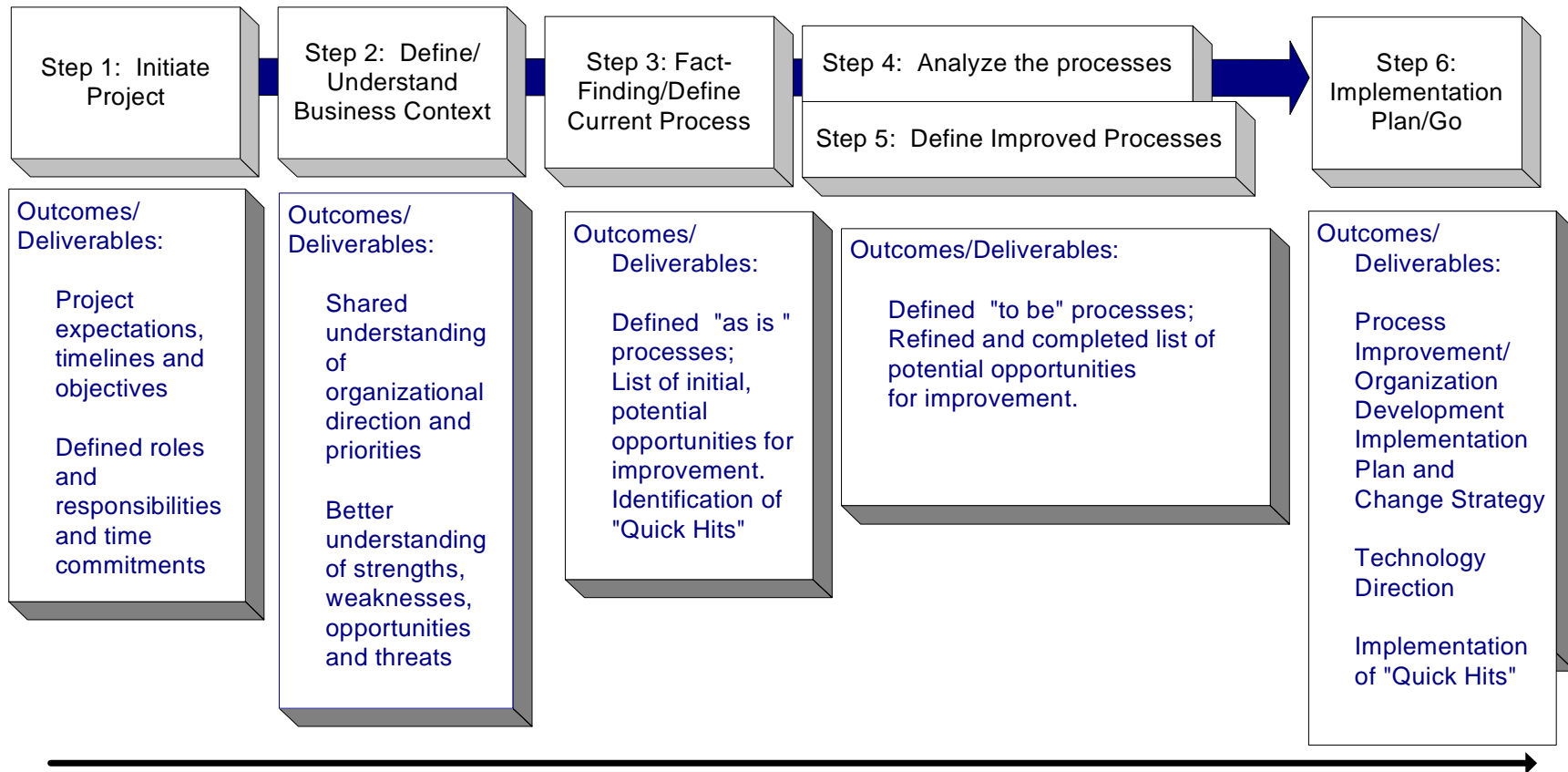
- Constituent Relationship Management
- Gift Management
- Event Management
- Campaign Management
- Membership & Group Management

Reporting & Analysis Functions

- Prospecting
- Campaign Analysis
- Operational Reporting
- Analytical Reporting
- Forecasting & Modeling
- Dashboards & Alerts



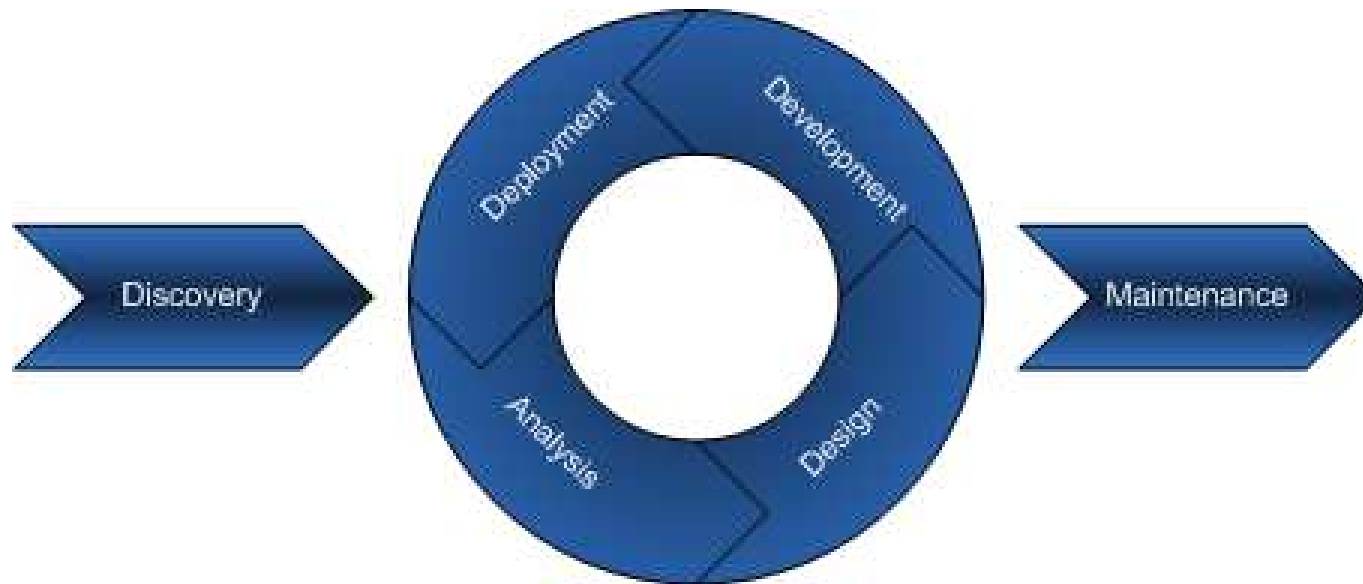
Our Approach: TSI Process Improvement Framework



8-12 weeks

Our Approach: CBIG Reporting & Analysis Framework

CBIG TruCourse™ Methodology Business Intelligence Methodology Life Cycle



Project Management and Change Management

Based on over 20 years of BI Best Practice Experience

Technology Independent

Flexible

We Have Helped

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IES
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Next Steps

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