

MAY 23, 2024

Lunch and Learn

UNIVERSITY ADVANCEMENT TECHNOLOGY TRANSFORMATION



VISION

UC RIVERSIDE

BOLD HEARTS. BRILLIANT MINDS.



Key Outcomes

Future State

01 Sunset Disparate Systems

04 Master Data Management

02 Implement a
Platform/Ecosystem

05 Business Intelligence

03 Embrace Enterprise Solutions

06 Deliver Exceptional
Experiences



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

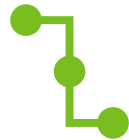
360-Degree Relationship Management

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.



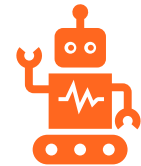
Native Data Integration

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

WHAT'S BEEN DONE



Progress

Forward Momentum

Salesforce

CRM Selection

Implementation Consultant Partner

Marketing Cloud

Oracle Financials for the Foundation

WHAT'S NEXT

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Sprint Methodology

- Agile approach – functional sprints focused on modules of ascend
- Each sprint is roughly 6 weeks
- Each sprint will consist of Planning, Building, and User Acceptance Testing (UAT)
- Sprint teams are made up of subject matter experts and business end users



Project Sprints

- **Bio Demo (4 sprints)**
- **Gift & Pledge Processing (3 sprints)**
- **Stewardship & Memberships (1 sprint)**
- **Prospect Research & Management (2 sprints)**
- **Donor and Alumni Portals (2 sprints)**
- **Backlog (1 sprint)**

Sprint Sample Timeline

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18				
Sprint 1 <i>Constituents (part 1)</i>	Planning + Scope Finalization		Build		UAT, Demo + Sign-off		New/Unapproved features move to backlog															
Sprint 2 <i>Constituents (part 2)</i>					Planning + Scope Finalization		Build		UAT, Demo + Sign-off													
Sprint 3 <i>Organizations & Related</i>									Planning + Scope Finalization		Build		UAT, Demo + Sign-off									
Sprint 4 <i>Households & Related</i>													Planning + Scope Finalization		Build		UAT, Demo + Sign-off					
Data Migration/ Integrations	Data Migration/Integrations Pre-Reqs						Hand off updated config/data specs				Spring 1 Data Migration/Integrations Prep				Spring 2 Data Migration/Integrations Prep				Spring 3 Data Migration/Integrations Prep			
Marketing Cloud													SFMC Kickoff		Sprint 1: Planning		Sprint 1: Build		Sprint 1: UAT			
Portal	SAMPLE																Portal Kickoff		Sprint 1: Planning			

Project Teams



Project Leadership Team

Executive Sponsor
Project Sponsors
Technology Sponsor



Project Management Team

Primary Attain Contact
Project Management
Logistics & Project Support



Change Management Team

Change Champions
Training & Engagement
Internal Communications



Data Team

Data Health/Cleanup
UA Data Dictionary
Data Mapping RE to SF
Integrations



Key Stakeholders

UA Department Heads
Central ITS Leadership

Business and Technical Subject Matter Experts



Functional Business Teams

Bio Demographical
Gift Processing
Stewardship & Memberships
Prospect Development



Marketing Cloud Team

Marketing Cloud Configuration
Audiences & Data Extensions
Branded Content Templates
Journey Builder
CRM 360 & Analytics



Alumni/Donor Portal Team

Portal Configuration
Branding and Content
UX Testing



GETTING STARTED!

- **Attain will be on-site next week!**
 - **May 29th – May 31st**
- **Project Kick-Off for All Staff – May 29th**
- **Several meetings with project teams and stakeholders**
 - **Functional Business Teams**
 - **Change Management Team**
 - **Data Team**
 - **Project Leadership**



ATTAIN ON-SITE VISIT – DAY 1

- **May 29th**
 - **Morning –**
 - **Project Kick-Off**
 - **All UA Staff, Central ITS Stakeholders**
 - **Afternoon –**
 - **Salesforce and Ascend 101**
 - **All Project Team Members**
 - **Agile 101**
 - **All Project All Project Team Members**
 - **Project Vision and Goals**
 - **Project Leadership, Key Project Team Members**



ATTAIN ON-SITE VISIT – DAY 2

- **May 30th**
 - **Morning –**
 - **Change Approach & Deliverables**
 - **Project Leadership, Change Management Team**
 - **Engagement & Training Introduction**
 - **Project Leadership, Change Management Team**
 - **Afternoon –**
 - **Leadership Check-in & Next Steps**
 - **Project Leadership, Central ITS Leadership**
 - **Project Roles & Responsibilities**
 - **Project Leadership, Key Project Team Members, Central ITS**



ATTAIN ON-SITE VISIT – DAY 3

- **May 31st**
 - **Morning –**
 - **Data Strategy: Data Health Assessment**
 - **Project Leadership, CMT, Data Team Members, Central ITS**
 - **Afternoon –**
 - **Data Deep Dive**
 - **Project Leadership, CMT, Data Team Members, Central ITS**



I'm so freakin' excited

READY?

SET?

GO!

QUESTIONS?