



Welcome to

# **Salesforce & ascend Implementation KICKOFF**

# DAY 1

May 29, 2024

**9 – 11:55 am Kickoff**

- Project Vision
- Team Introductions
- *ascend* Overview
- Project Next Steps

**12 – 1 pm Break**

**1 – 1:55 pm Salesforce & *ascend* 101**

- Introduction/Tool Familiarization
- Tool Interface
- Key Terms
- Q&A

**2 – 2:55 pm Agile 101**

- Agile Introduction
- Expectations
- Sample Schedule
- Session Objectives

**3 – 5 pm Project Vision & Goals**

- Vision Ideation
- Goal Formulation
- Alignment and Refinement

# DAY 2

May 30, 2024

**8 – 8:55 am**

## **Change Approach & Deliverables**

- Introduction to Change Management Principles
- Statement of Work Deliverables
- Current State -> Future State
- Next Steps

**9 – 10:45 am**

## **Engagement & Training Intro**

- Engagement Approach Strategies
- Discovery of Communication Practices
- Crafting Customized Engagement
- Current Training Practices
- Training Approach Development

**11 am – 1 pm**

## **Break**

**1 – 1:55pm**

## **Wrap Up / Next Steps**

**2 – 3:55 pm**

## **Roles & Responsibilities**

- Organizational Roles
- RACI

# DAY 3

June 1, 2024

**9 – 10:55 am**    **Data Strategy: Data Health Assessment**

- Integrations Process
- Migration Process
- Governance
- Data Management Process
- Data Hygiene Process
- Health Assessment Process

**11 am – 3 pm**    **Data Deep Dive (with lunch)**

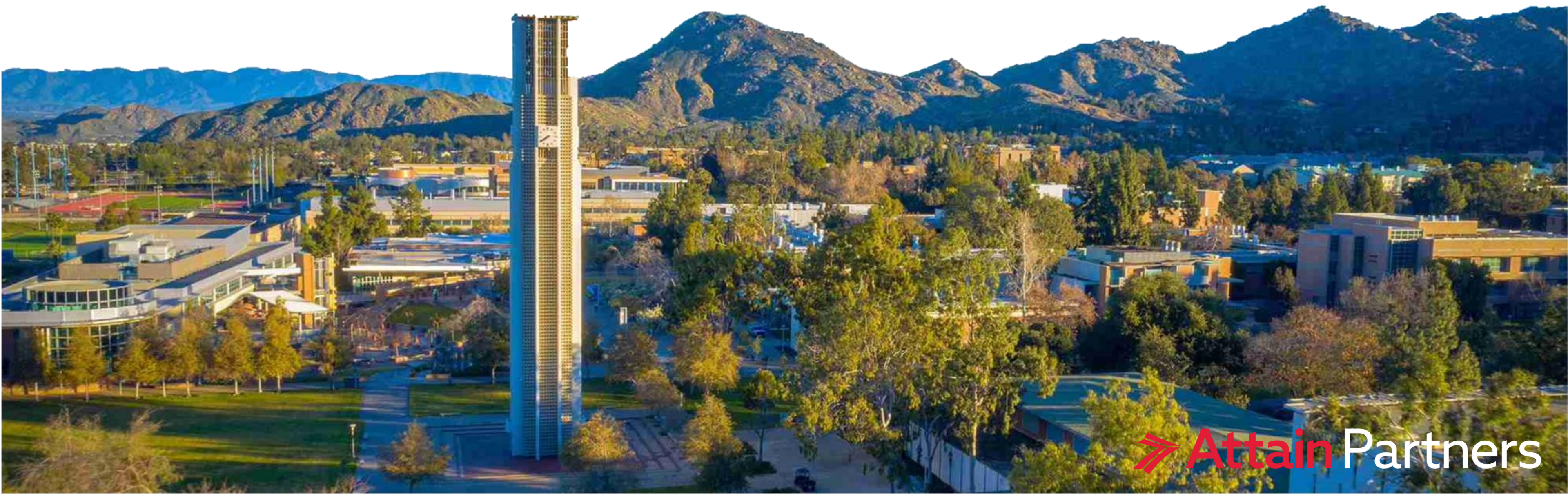
- Timeline
- Data Validation Approach
- Delta Load
- Environment Setup
- Attain Provisioning
- Technology Deployment Processes

# KICKOFF ITINERARY

01	Destination: Our Vision
02	Explorers: The Project Team
03	The River: Our System
04	The Journey: Our Project

# Our Vision

To implement a **modern system** that supports the **growth** and volume of **fundraising** and engagement initiatives across the **institution**.



# EXPLORERS

The Project Team



# Leadership Team



**Monique Dozier**

Vice Chancellor for  
University Advancement  
**Executive Sponsor**



**Josh Carter**

Chief of Staff,  
University Advancement  
**Project Sponsor**



**Kim McDade**

Chief Financial and  
Administrative Officer,  
University Advancement  
**Project Sponsor**



**Mai Vang**

Director, Constituent  
Management and  
Technologies  
**Technology Sponsor**





# Core Project Team



**Kim Byrd**

Project Manager & Internal  
Change Communications



**Vanessa Torrez**

Change Management &  
Training Lead



**Iris Tam**

Data Lead



**Kelly McGrail**

Marketing Cloud Lead



**Patrick Nance**

Bio Demographical and  
Gift Processing Lead



**Ian Foster**

Stewardships and  
Memberships Lead



**Kimberley Harvie**

Prospect Development  
Lead



**Scotty Highlander**

Head of Shenanigans and  
Hijinks

# **Attain** Partners

## Project Leadership Team



**Reshma  
Patel-Jackson**

Partner and Attain  
Digital Lead



**Virginia  
Berkenkotter**

Director of Higher  
Education Delivery



**Jason Hunter**

Technical Architect



**Andrew Whittaker**

Business Development  
Director

# **Attain** Partners

## Core Project Team



**Leslie  
Johnson**

Project  
Manager



**Richard  
Bobo**

Senior  
Consultant



**Sarah  
Milward**

Change  
Consultant



**Jen  
Best**

Change  
Manager



**Matt  
Roush**

Principal Solution  
Architect



**Ilya  
Pinchuk**

Integrations  
Lead



**Arun  
Jayaseelan**

Solution  
Architect

# The Explorers: **Attain's North Star**



# KEYS TO A SUCCESSFUL PARTNERSHIP

1. Alignment on project vision
2. Transparency
3. Buy-in and engagement
4. Collaborative space
5. Clear roles and responsibilities
6. Shared ownership



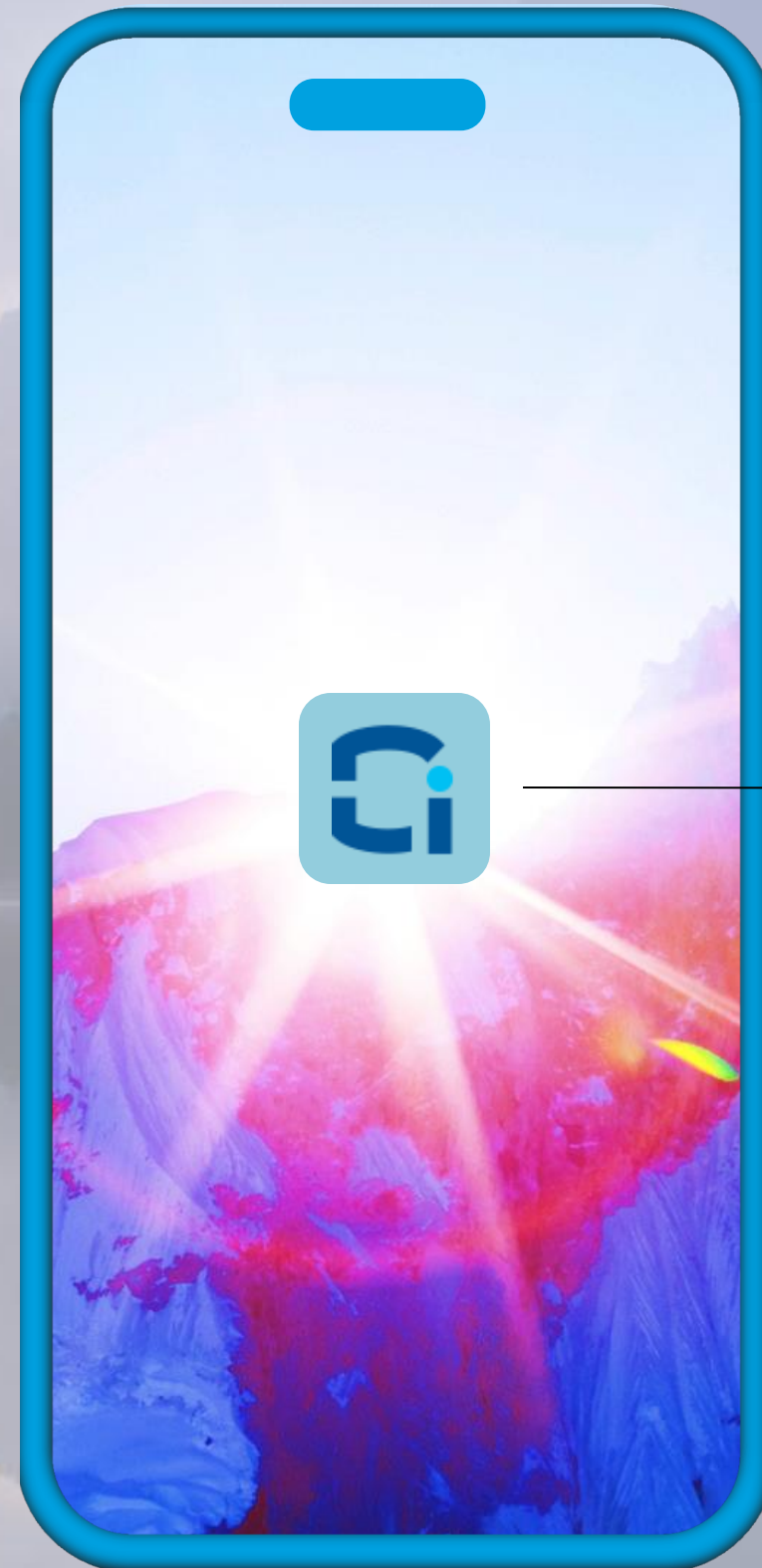
# THE RIVER

Our System

# Think of **Salesforce** like a smart phone.

Smartphones are built so thoroughly that they can act as a platform for the creation of awesome applications.

The phone itself is great, but downloading the right applications is what makes it perfect for you.



## *ascend*

*ascend* is an Advancement and Constituent Engagement solution built on the Salesforce platform.

It adds Prospect Management and Research, Gift Processing, and other Advancement-specific functionality to Salesforce's robust Client Relationship Management abilities.

# The River: WORTH THE JOURNEY

## PROSPECT MANAGEMENT

- Contact reports, strategies, tasks, research, and proposals tie together
- Easy automated integrations for both gift & bio
- Manage and track household records more efficiently

## GIFT PROCESSING

- Streamlined processing of all gift types
- Expedited matching gifts
- Expanded payment types

## DATA & REPORTING

- Better forecasting, analytics and out-of-the-box reports
- Intelligence to support campaign, operations
- Automated integrations
- Campaign management

## CONSTITUENT RELATIONSHIPS

- Actual CRM!
- 360 Constituent View
- Increased engagement
- Modern online and mobile experience
- Updated contact information

## ALUMNI/DONOR RELATIONS

- Increased Alumni Community Networking & Alumni Engagement
- Alumni Donor Portal
- Ties to Marketing Cloud and other systems to engage with constituents



# 360° Constituent View



Search...



ascend by UC Innov...

Home

Constituents

Organizations

Sessions

Opportunities

Reports



CONSTITUENT INDICATORS



## Mr. Scotty Highlander

+ Follow

Edit

Delete

Manage Household



Title

Account Name

[Highlander Household](#)

Phone (2)

(555)555-5555

Contact Owner



[Jennifer Best](#)

Overview

Constituent Details

Prospect Management

Chatter

Name

Mr. Scotty Highlander

Is Name Overridden

Recognition Name

Mr. and Mrs. Highlander

Is Recognition Name Overridden

Preferred Pronouns

He/Him/His

Gender

Male

Professional Designation

MBA

Ethnicity

Marital Status

Married

Religious Preference

Spouse

Linda Highlander

Description

Salutation Preference

Joint

Is Anonymous

Employee Id

▼ Patient Information

MBN

Most Recent Primary Care Provider

# 360° Constituent View



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[Highlander Household](#)

Phone (2)

[\(555\)555-5555](#)

Contact Owner



[Jennifer Best](#)

Overview

**Constituent Details**

Prospect Management

Chatter

**Giving Details**

Names

Salutations

Addresses

Phones

Emails

Social Media

More

Filter by Designation



Apply Filter

Clear

Giving Totals

	Fundraising	Cash
Lifetime	\$1,000,000.00	\$500,000.00
Campaign		

Pledges / Recurring Gift Commitments

	Amount	Date	Unit
First	\$100.00	Feb 18, 1960	
Largest			
Most Recent			

Pledge Payments

	Amount	Date	Unit
First			
Largest			
Most Recent			

Gifts

	Amount	Date	Unit
First			
Largest			
Most Recent			

# Prospect Management



**Opportunity**  
**SH\_Feb 2024**

[+ Follow](#) [Edit](#) [Delete](#) [Printable View](#)

Account Name	Planned Date	Amount	Opportunity Owner
	2/16/2024	\$250,000.00	<a href="#">Jennifer Best</a>



Activity	Details	Chatter
Opportunity Name	RY_Feb 2024	Gift/Pledge Type
Opportunity Record Type	Proposal	Account Name
Stage	Submitted	Constituent
Probability (%)	50%	<a href="#">Scotty Highlander</a>
Planned Date	2/16/2024	Description
Submitted Date		Amount
		\$250,000.00
		Submitted Amount

### Related

- Proposal Designations (0)**
- Contact Roles (0)**
- Files (0)**

[Upload Files](#)

Or drop files

# Data & Reporting



Search...



ascend by UC Innov...

Work Manager

Sprints

Teams

Kanban Board

Product Tags

Themes

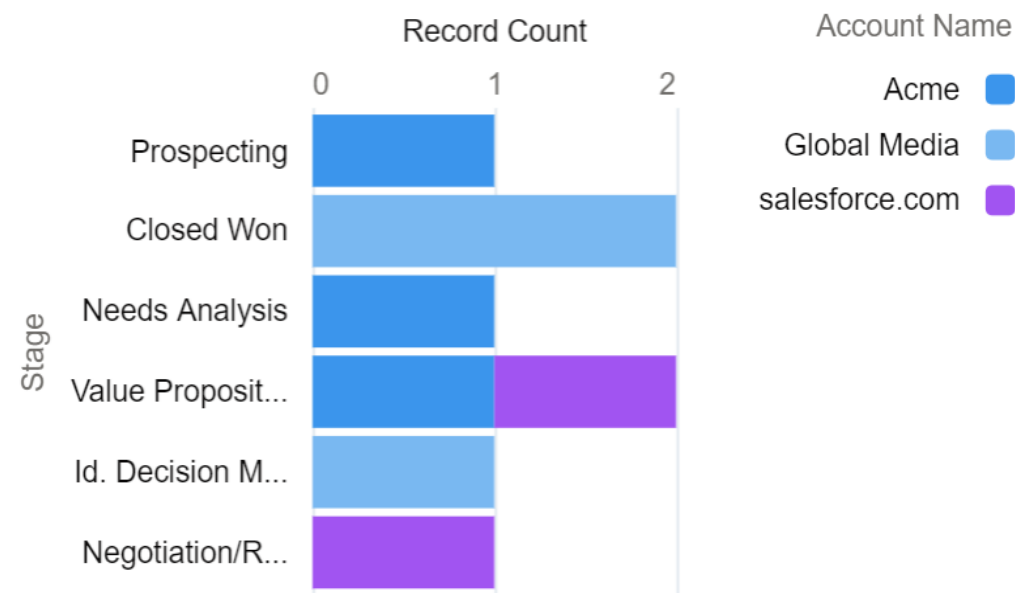
Reports

Dashboards

\* More

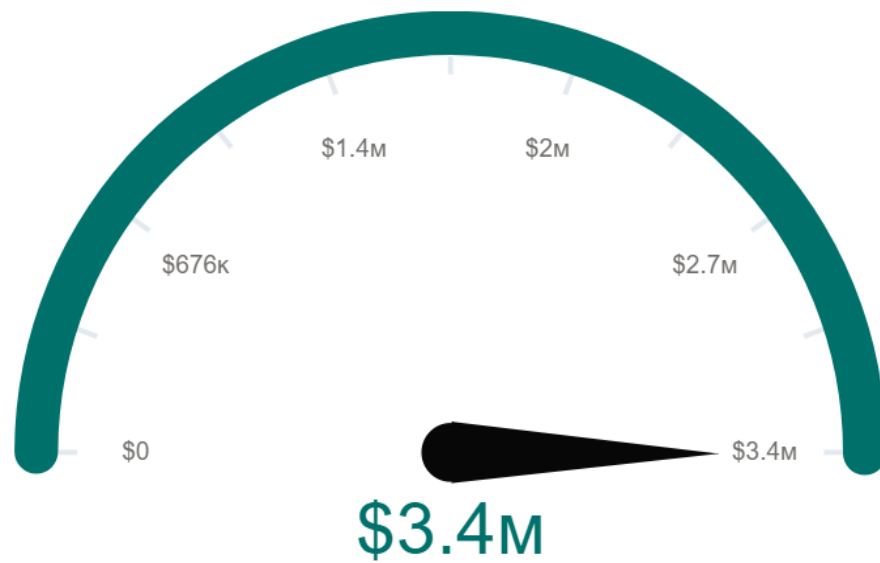


Opportunities per Stage and Account



[View Report \(New Opportunities Report\)](#)

Historical Opportunities



[View Report \(New Opportunity Trends Report\)](#)

Totals per Stage

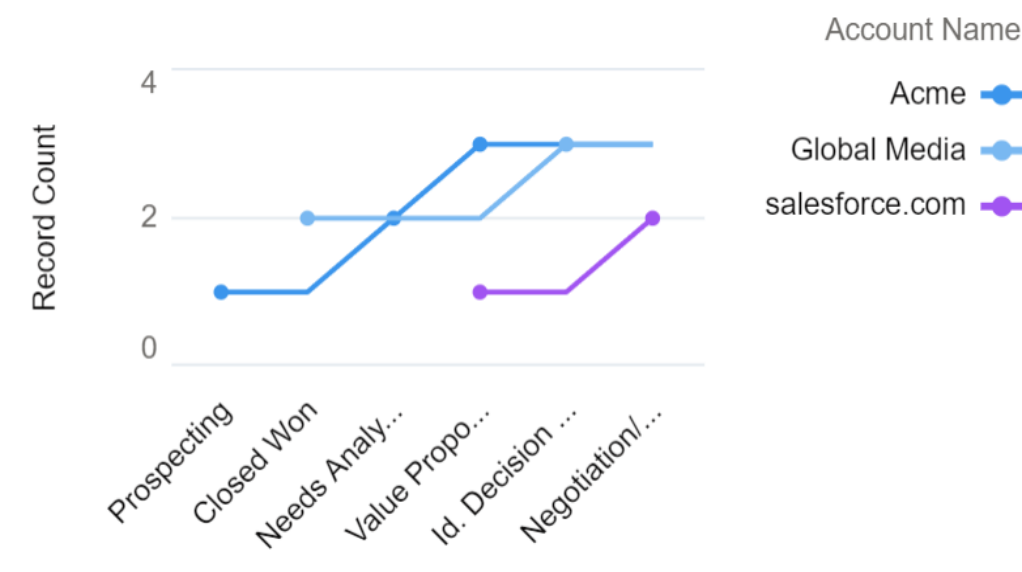
Stage ↑	Sum of Amount	Record Count
Prospecting	\$20.00k	1
Closed Won	\$550.00k	2
Needs Analysis	\$70.00k	1
Value Proposition	\$160.00k	2
Id. Decision Makers	\$40.00k	1
Negotiation/Review	\$100.00k	1

[View Report \(New Opportunities Report\)](#)

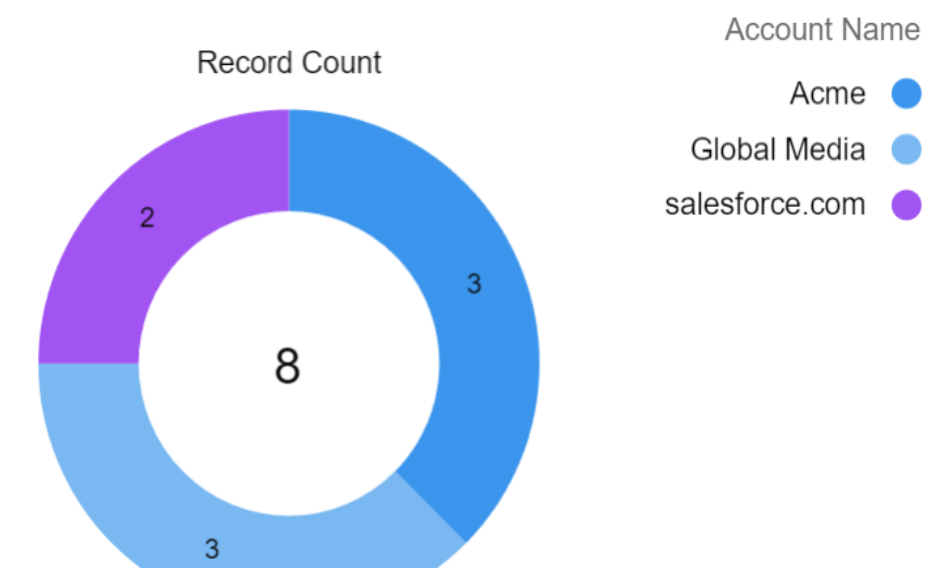
Distribution by Stage



Stages by Account



Total Opportunities by Account



# THE JOURNEY

Our Project



# The Journey: **WHAT'S COMING?**

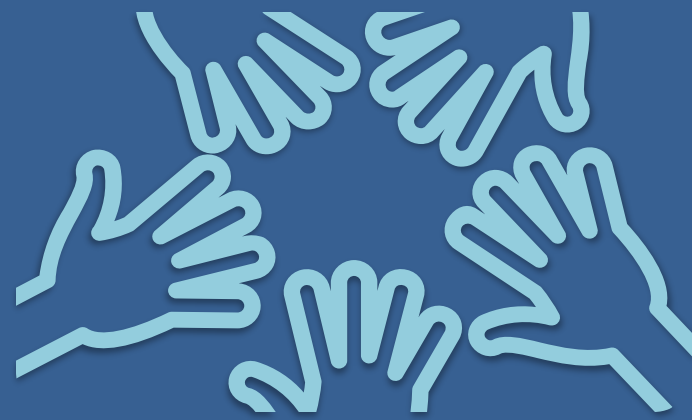
- **Salesforce and *ascend***
- Donor/Alumni/Volunteer online portal
- Marketing Cloud

# Support and Training: Change Management



## Training Sessions

- End-users
- Administrators



## Change Champion Network

- Town Hall sessions
- Peer assistance
- Early tool adoption



## Post-Implementation Support

- Office hours
- Follow-up training (if needed)



# The Journey: **PROJECT Plan**



## **KICKOFF**

We are here!



## **DISCOVERY & PLANNING**

Getting to know your current state, and planning for the build



## **SPRINTS & TESTING**

Building your system step-by-step so that we can move and iterate quickly and that each piece of functionality is working as expected



## **DATA VALIDATION**

Ensuring your data is present and clean



## **END-TO-END TESTING**

Making sure all the pieces of the system work together and that your business processes work



## **TRAINING**

Teaching end users how to perform their roles in the new system



## **GO LIVE**

Completing our journey and beginning to use the system we've worked so hard to build!





## **JUNE**

### **Discovery and Planning**

- Project timeline and sprint schedules
- Stakeholder engagement and communication planning

## **JULY - SEPT**

### **Constituent Bio Demo**

- Data related to donors (e.g., contacts, salutations, addresses)
- Involvement codes, service indicators, relationships
- Degree information

## **SEPT - NOV**

### **Organization and Household Bio Demo**

- Affiliations to households and organizations
- Corporation and Foundation involvement codes, service indicators

## **OCT - MARCH**

### **Processing Gifts and Pledges**

- Gifts and pledge records
- Designations and appeals
- Review transaction feature

## **MARCH - APRIL**

### **Stewardship, Memberships & Giving Societies**

- Automations, Renewals
- Naming Opportunities

## **APRIL - JUNE**

### **Prospect Research and Management**

- Assignments, briefings, research, wealth ratings, strategies, and funding interests
- Contact reports, proposals, planned gifts, and briefings

# The Journey: **OUR COURSE**

# The Climb: WHAT WE NEED FROM YOU



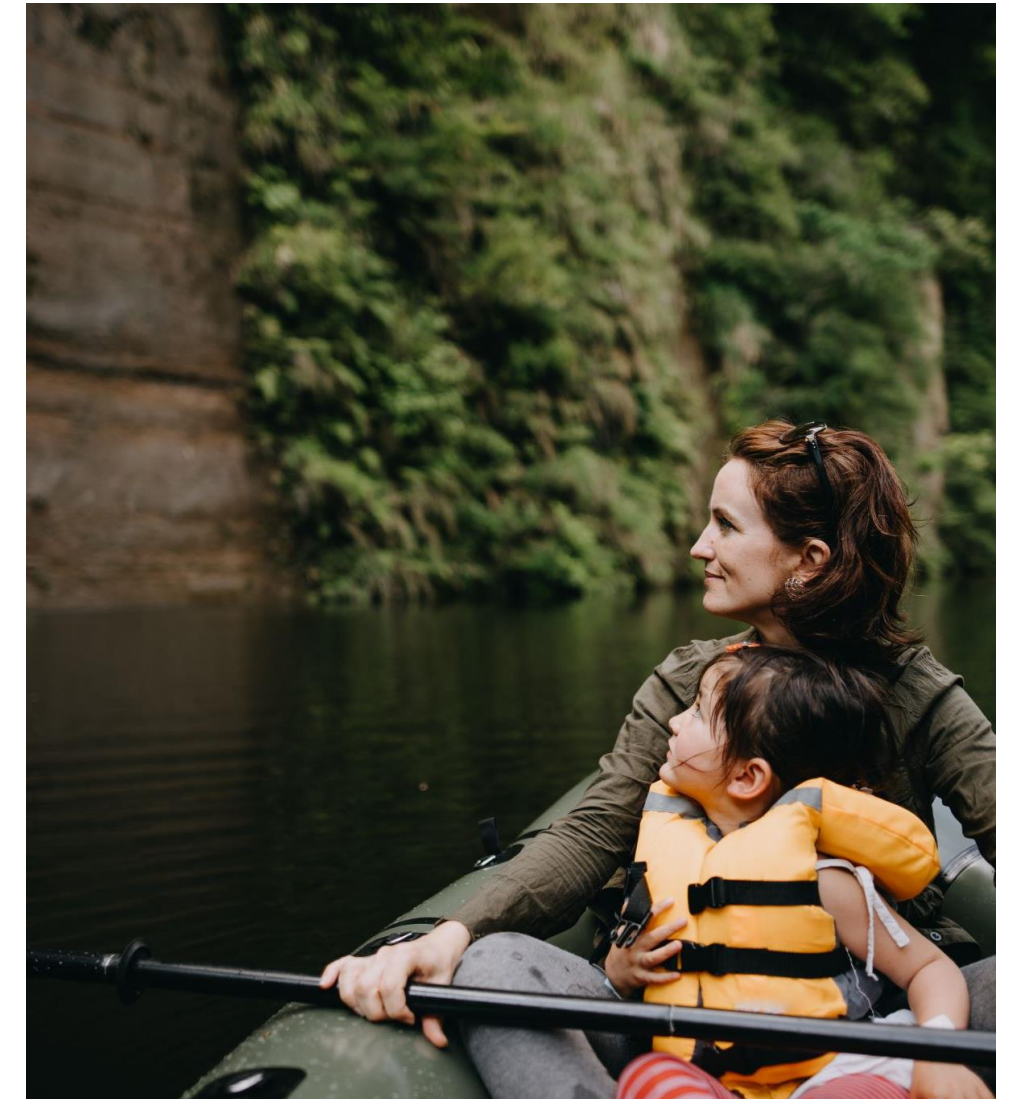
## PLANNING

Help the Attain team understand what we need to build during each sprint based on your functional area expertise



## TESTING

Ensure the system is functioning as it should during UAT after each sprint, then check that all the pieces together during end-to-end



## TRAINING

Learn to use the system to perform your day-to-day tasks and establish new business processes as needed



THANK YOU

We can't wait to take this journey together.

