



# GAIL 2019 Survey Check-In

Client Services  
Development & Alumni Relations

A photograph of a person's hands holding and reading a newspaper. The newspaper is open, and the text is visible. The background is blurred, showing what appears to be a library or office environment with bookshelves and other people. The lighting is warm and soft.

## Background Info

The 2019 GAIL Survey was sent out on March 18th, to current GAIL users.

Its purpose was to gather feedback and guide future system updates.

Results were published on April 22nd on the GAIL Resources site.

# Action Items

1. New Constituent Tiles
2. UGA Employment History
3. Employer Short Screen
4. Records Information Portal
5. Single Page Marketing Efforts
6. Simplifying Multi-Level Event Registration
7. More BEE Templates
8. Email Alerts for Expiring and Expired Plan Steps
9. One Click Historical Plans



# 1

## New Constituent Tiles

**Knowles-Carter , Mrs. Beyoncé Giselle (Queen Bey)**

Individual    Lookup ID: 11003265

Constituencies: Prospect

Personal Information	Contact Information	Addresses
<p><b>Mrs. Beyoncé Giselle Knowles-Carter</b> Nickname: Queen Bey Maiden:</p>	<p><b>Primary phone</b> +1 (706) 555-2468 (Cell)</p> <p><b>Primary email</b> beyonce@beyonce.net (Business)</p>	<p>1324 Athens Way Athens, GA 30601</p> <p>Residence (Current)</p>

Show less    Customize tiles

### GOAL

Two new info tiles:

- ❑ The 1st will display the groups and committees that a constituent is a member of.
- ❑ The 2nd will display the status of UGA employees.

### PROGRESS

We've assessed that it is feasible to add new info tiles to contain this information.

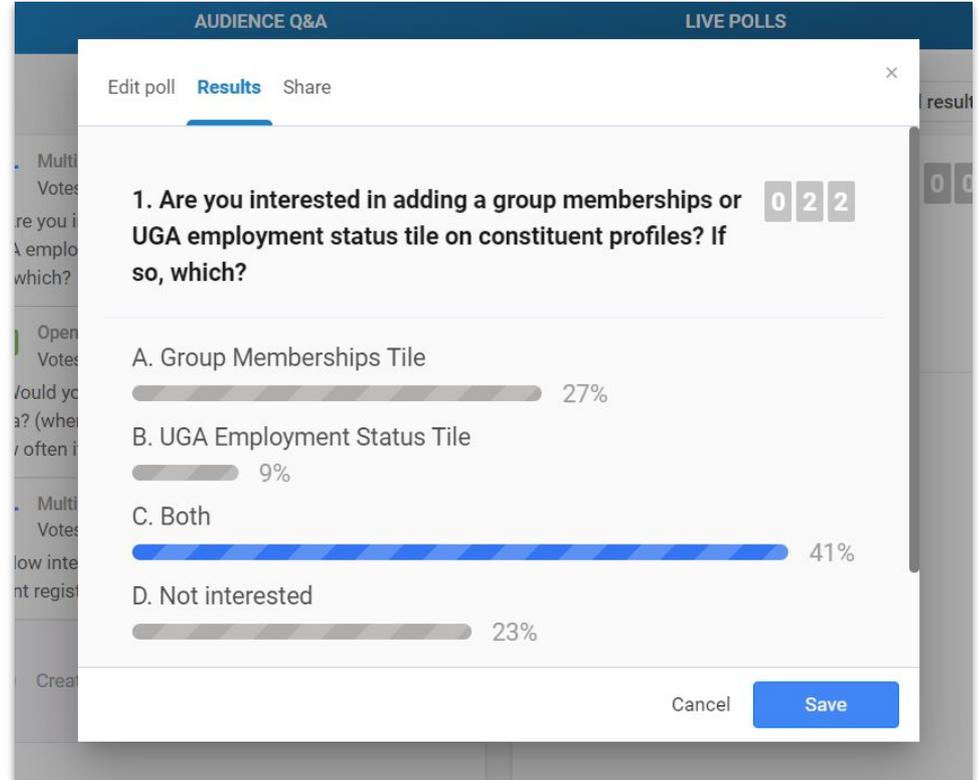
For group memberships, may not be faster than navigating to **relationships >> group member**.

We'd love your feedback.

# 1 New Constituent Tiles

We asked our GAIL Steering Committee at the December 11th, 2019, meeting if they were interested in new info tiles for group membership and UGA employee status.

Here's what they said:



# 2 UGA Employment History

Name	Constituent type	Type	
<b>Organization</b>			
University of Georgia	Organization		
<b>Employment history (2)</b> + Add   Filters   More ▾			
<input checked="" type="checkbox"/> Include inactive   Apply   Reset			
Name	Job title	Location	Job category
University of Georgia	LAB ANIMAL SPEC/CONTAINMENT		
University of Georgia	ANIMAL RESOURCES MANAGER	Athens, GA	

## GOAL

For UGA employees, you'll be able to see new and old positions held on their relationships tab.

## PROGRESS

Done! This is already happening! One thing to note is that this applies from January 2019 onward.

# 3 Employment Short Screen

The screenshot shows a web form titled "Add a relationship". It has three tabs: "Relationship information" (active), "Employment and contact information", and "Employment location / info source". Under the active tab, there is a "Related organization:" field with a search icon. Below it is a "Relationship" section with a dropdown menu showing "Morehead , President Jere Wade (Jere) 1980 is the:". To the right, there is a "Recognition credits" section with a checkbox "Apply to Morehead , President Jere Wade (Jere) 1980 revenue from organization", a "Recognition credit type:" field, and a "Recognition credit match percent:" field with a value of "100.00".

## GOAL

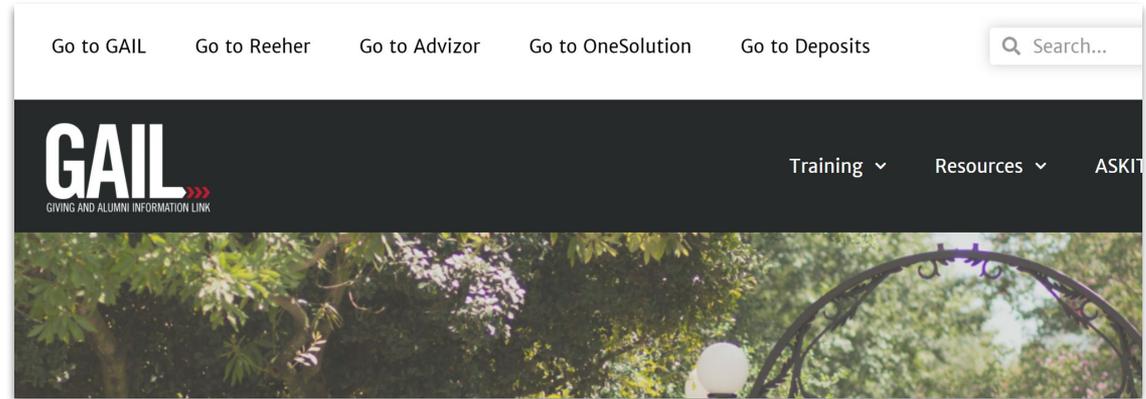
Make adding new employment information easier by putting relevant fields all on one tab instead of separating them over three.

## PROGRESS

Here are our ideas for those wanting to simplify the process getting employment info into GAIL:

- ❑ Submit an AskIT ticket to records if you don't have time to make employment changes yourself,
- ❑ We're looking into adding a quick "send to records"-type button to constituent profiles.

# 4 Records Information Portal



## GOAL

For the GAIL resources site, a new Records Portal that would contain an FAQ section, instructional guides for updating constituent data, and a masterlist of constituent information sources.

## PROGRESS

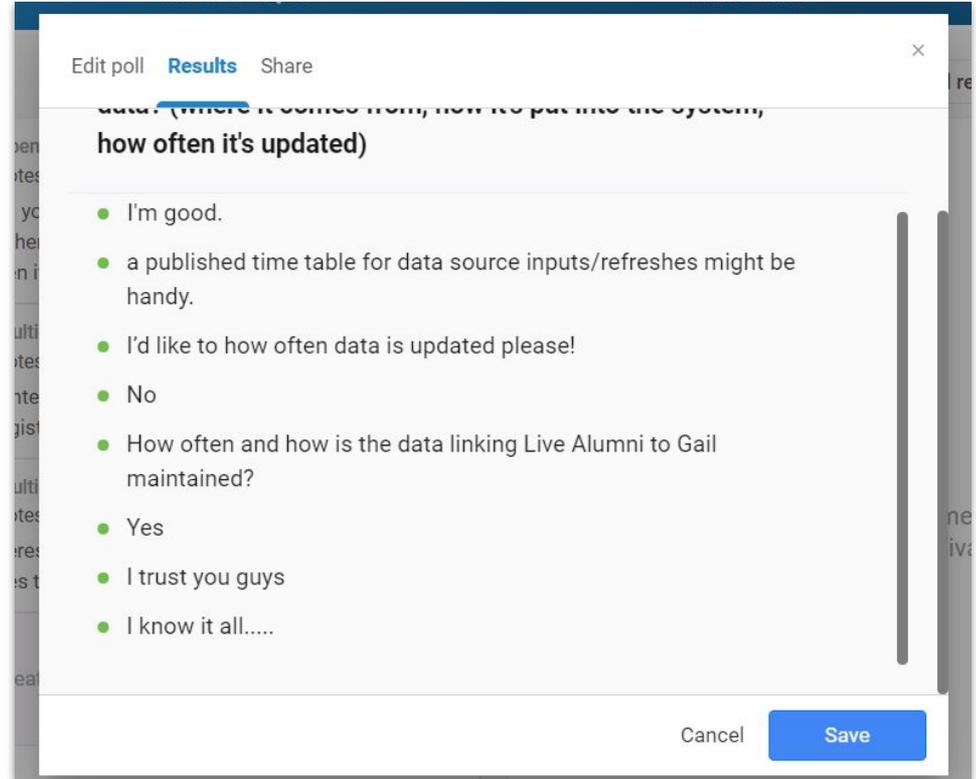
One major step towards this goal has been creating a records G-Wiz.

Also held our first Records Q&A during summer workshops.

# 4 Records Information Portal

We asked our GAIL Steering Committee at the December 11th, 2019, meeting what information about the records in GAIL would they like to know more about.

Here's what they said:



# 5

## Single Page Marketing Efforts

The screenshot displays a software interface for managing marketing efforts. On the left is a 'Tasks' sidebar with the following options: Edit marketing effort, Delete effort, Request a selection, Create/edit an email, Create/edit a package, Create/edit a segment, Edit activation criteria, Refresh effort, Export effort, and Remove members. The main area shows the 'Direct Marketing Efforts' dashboard for 'MARCUM - FY20 Nov 27 UGA Tomorrow'. It includes an 'Overview' section with a table of key metrics and a 'Status' column.

Overview		Status		
Template:	Simple Email Template	Status:		
Effort ID:	17,588	Owner:	Michael P James	Segments:
Appeal:	MC20	Budget:	\$0.00	Packages:
Due date:	11/25/2019	Expected revenue:	\$0.00	Segment c
Launch date:	11/27/2019	Total expenses:	\$0.00	Seed quar
Description:	Weekly UGA news. Main headline: All students to get free jetpacks.			Total quar

### GOAL

Create both your package and segment inside your marketing effort.

Also provide shortcut links to make navigating between your BEE email and your DME easier.

### PROGRESS

Done! New links were added to the sidebar to easily get to selection requests, BEE, and package and segment creation.

Combine this with the DME dashboard and you can complete your DME all in one place.

# 6 Simple Multi-level Registration

and local Athens venues. For more information, please visit <https://art4socialjustice.wordpress.com/>.

Step 1: Start      Step 2: Prices      Step 3: Register      Step 4: Finish

## EVENT SELECTION

- ART AND EDUCATION FOR SOCIAL JUSTICE SYMPOSIUM 2020**

Please select this option and any of the options below that you will be attending.

## GOAL

The more complex your event is, the longer it takes for people to register. We will be looking into options to lessen the amount of clicks for our event invitees.

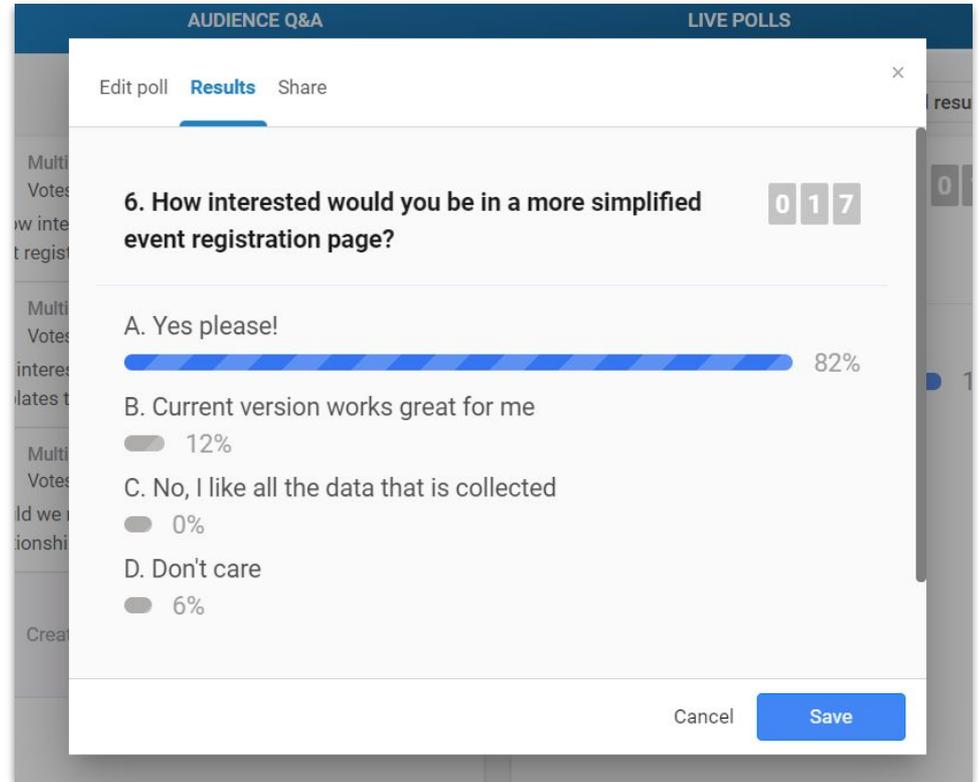
## PROGRESS

Currently evaluating new event page offered through Blackbaud that could help alleviate the issue of multi-level event registration overload.

# 6 Simple Multi-level Registration

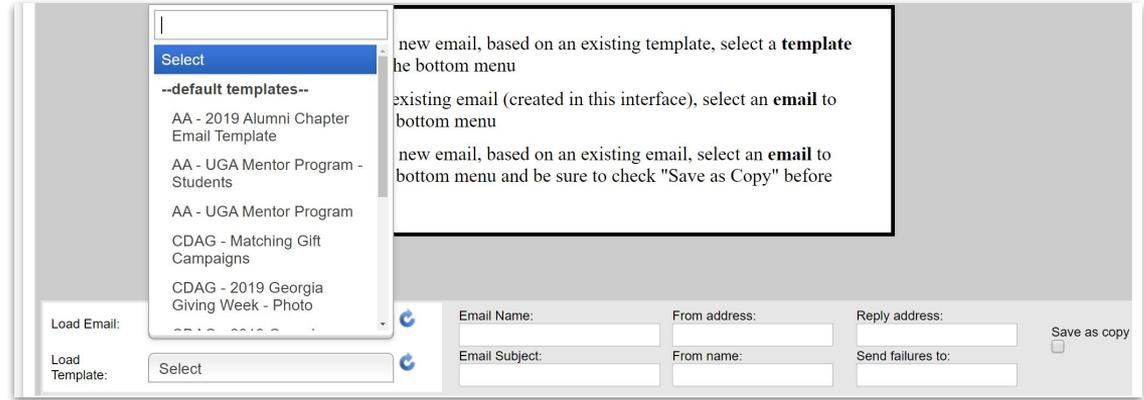
We asked our GAIL Steering Committee at the December 11th, 2019, meeting if they were interested in having the multi-level event registration page sign-up process simplified.

Here's what they said:



# 7

## More BEE Templates



### GOAL

Add more templates to BEE.

### PROGRESS

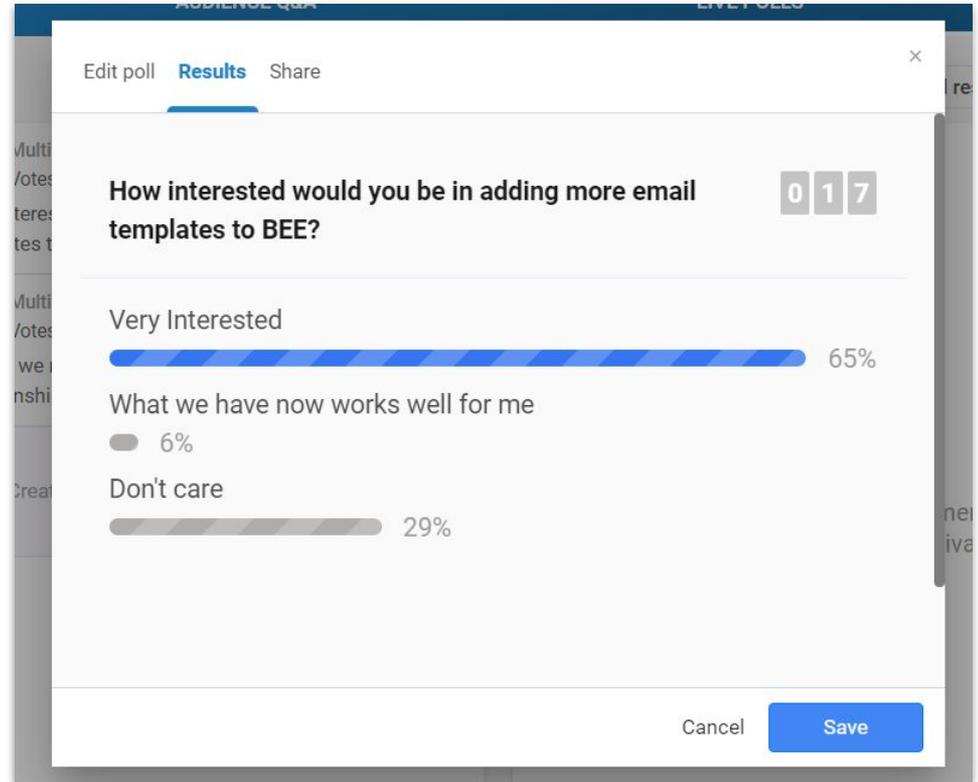
We've performed some preliminary review and generated some initial ideas. Next steps will be to solicit more specific feedback about templates to help guide the process a little more.

If you'd like some inspiration, here's something you can check out: <https://beefree.io/templates/>

# 7 More BEE Templates

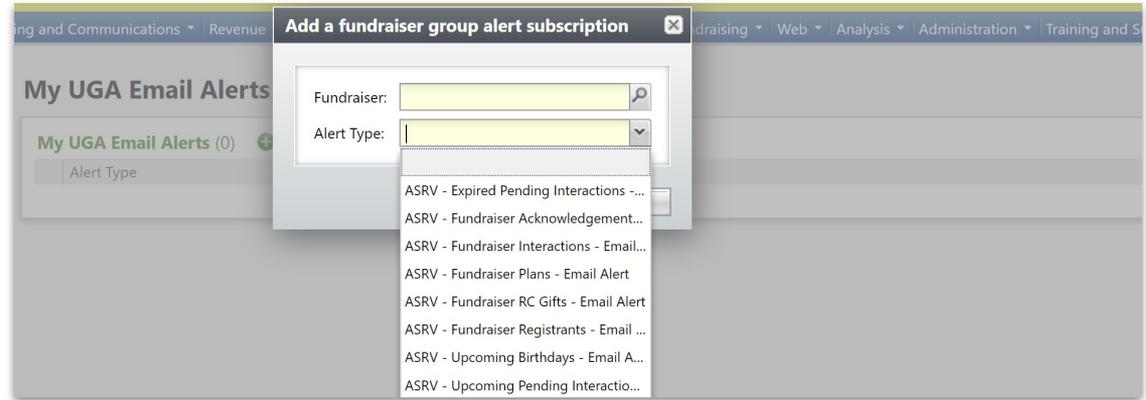
We asked our GAIL Steering Committee at the December 11th, 2019, meeting if they were interested in more templates in GAIL's email editor, BEE.

Here's what they said:



# 8

## Expiring & Expired Steps Alerts



### GOAL

Two new email alerts:

- ❑ The 1st will let you know if any pending steps in the upcoming week are due to expire.
- ❑ The 2nd will let you know if any pending steps the previous week have already expired.

### PROGRESS

Done! These new email alerts were added to GAIL in May 2019.

Additionally, we recently added one more email alert for relationships!

# 9 One-Click Historical Plans

The screenshot shows a CRM interface with a sidebar on the left containing 'Constituent Info', 'Tasks', and 'Shortcuts'. The main area displays details for a 'Major Giving Plan - ASRV - Beyonce Excellence Plan' for Mrs. Beyoncé Giselle Knowles-Carter. A modal dialog box titled 'Blackbaud CRM' is open, showing an error message: 'This plan cannot be made historical. All steps must have a status of completed, cancelled, or declined.' with an 'OK' button.

## GOAL

To make a current plan historical you need to delete all the active pieces involved, this includes plan steps and opportunities.

We will be looking into how a plan can be made historical with a single click.

## PROGRESS

We've established that there is broad interest to have this implemented in GAIL. It's currently the the queue to be worked on after some other projects have been completed. Stay tuned!

# Other Survey Feedback

Here are some other GAIL user suggestions mentioned in the 2019 survey to update you on:

*“I suggest that if a spouse is deceased then on the living spouse's record, that there be a way to notice that easily.”*

How about doing this with the tile? You would see **deceased** and the constituent's name. The red color would match the scheme of the flag that you see on the constituent's record.

The screenshot shows a constituent record for Anne Hathaway. At the top, it says 'Hathaway , Anne'. Below that, 'Individual Lookup ID: 11003296'. Under 'Relationships: Relation only', there are two tabs: 'Personal Information' and 'Primary Relationships'. The 'Personal Information' tab is active, showing a small portrait of Anne Hathaway, her name 'Anne Hathaway', 'Nickname:', and 'Maiden:'. The 'Primary Relationships' tab is also visible, showing 'Spouse (11003295)' with a red 'Deceased' flag next to it, and 'Shakespeare , William (Will) (Deceased)'. Below these are 'Primary business' and 'Job title' fields. An arrow points from the 'Spouse' link in the 'Primary Relationships' tab to a separate window showing the same 'Primary Relationships' tab with the 'Spouse' link highlighted and the 'Deceased' flag.

*“Direct link to the prospect's record in the research request queue.”*

Having 2 links side-by-side might be confusing, but we can definitely do this. Right now, getting to the constituent just requires clicking the existing link to go into the research request, then click the constituent link.

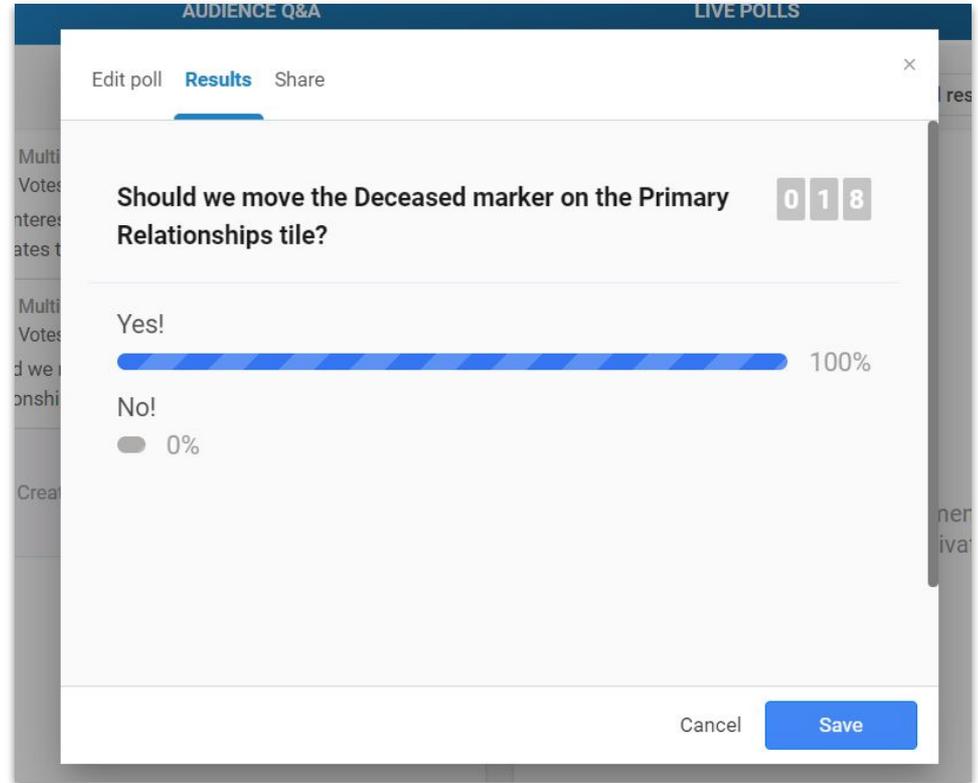
*“The donor information tab is very slow to load when a fund has lots of giving history.”*

The Fund/Purpose > Donor Information data list is a customized list. It was added July 2016. The customization is a complicated 1200 lines of code which already includes temp tables and CTEs to help with the load time.

## > Other Survey Feedback

We asked our GAIL Steering Committee at the December 11th, 2019, meeting if they were interested in relocating the deceased indicator on the Primary Relationships info tile.

Here's what they said:



# But Wait There's More!

As well as working on the suggestions from the GAIL survey, we've also implemented some other enhancements in the system. Here's some of the upgrades our teams have added this year!



- ★ Mentor/mentee relationships in GAIL
- ★ Segment creation services now offered by Query Team
- ★ Updated education tile and tab on profiles
- ★ Research requests directly from profile
- ★ Helpful, new columns on email statistics page
- ★ UGA Score & Campaign Giving info tiles
- ★ New Events II class and GAIL summer workshops
- ★ Chairs/Professorships of fund added on fund's related staff tab

A large, three-story brick building with a snow-covered roof and ground, framed by a red border. The building has multiple windows and chimneys. The foreground is covered in snow, and there are trees with snow on their branches. A semi-transparent white banner is overlaid on the middle of the image, containing text.

# Questions?

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