



2021 GAIL

USER SURVEY

Thank you for participating in our
"May the Fourth" survey. Review
these results and learn more
about GAIL, you will.



DAR
Client Services



STAR
WARS



PARTICIPATION RATES

JOIN THE *DAR-K* SIDE

While less than 100 GAIL users completed the survey this year, we received great feedback from our users. Please share these results with your team and reach out to Client Services if you have questions!



Q1 - How long have you been using GAIL?



4.2%

Less than a year



27.4%

1-2 years



41.0%

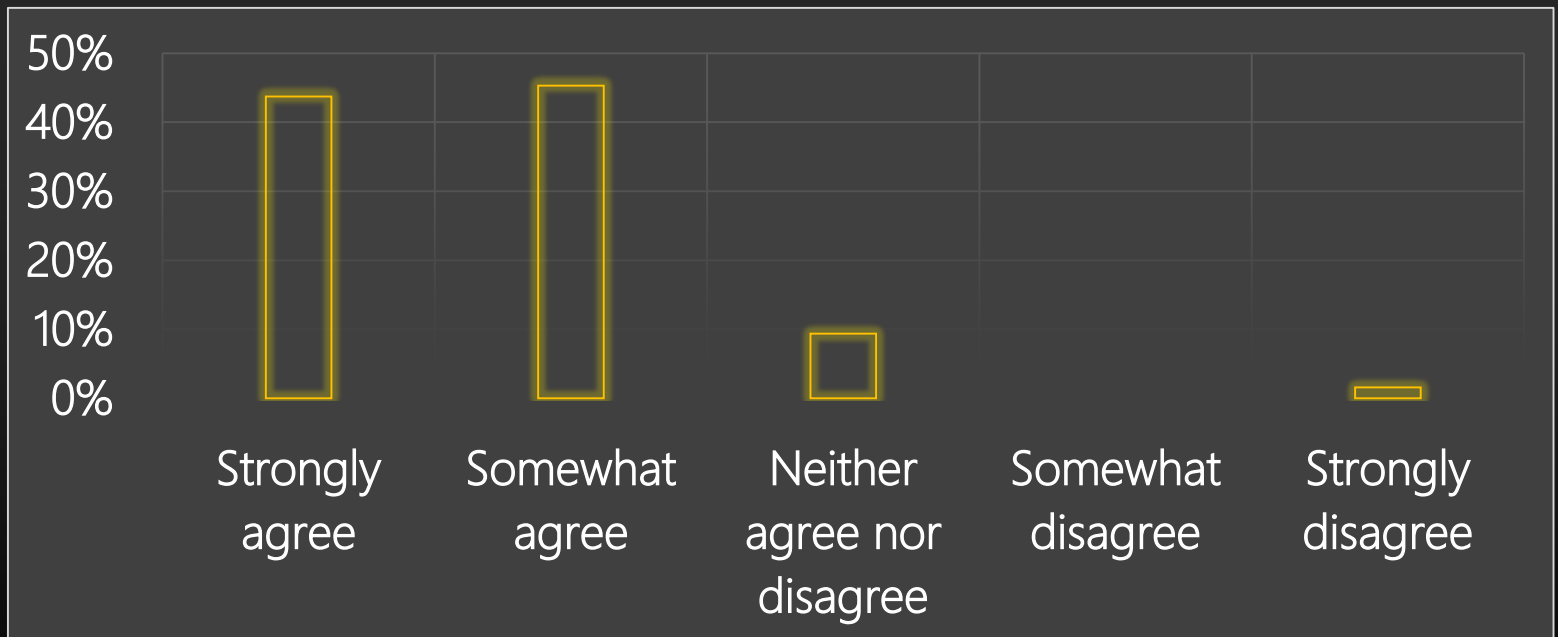
3-4 years



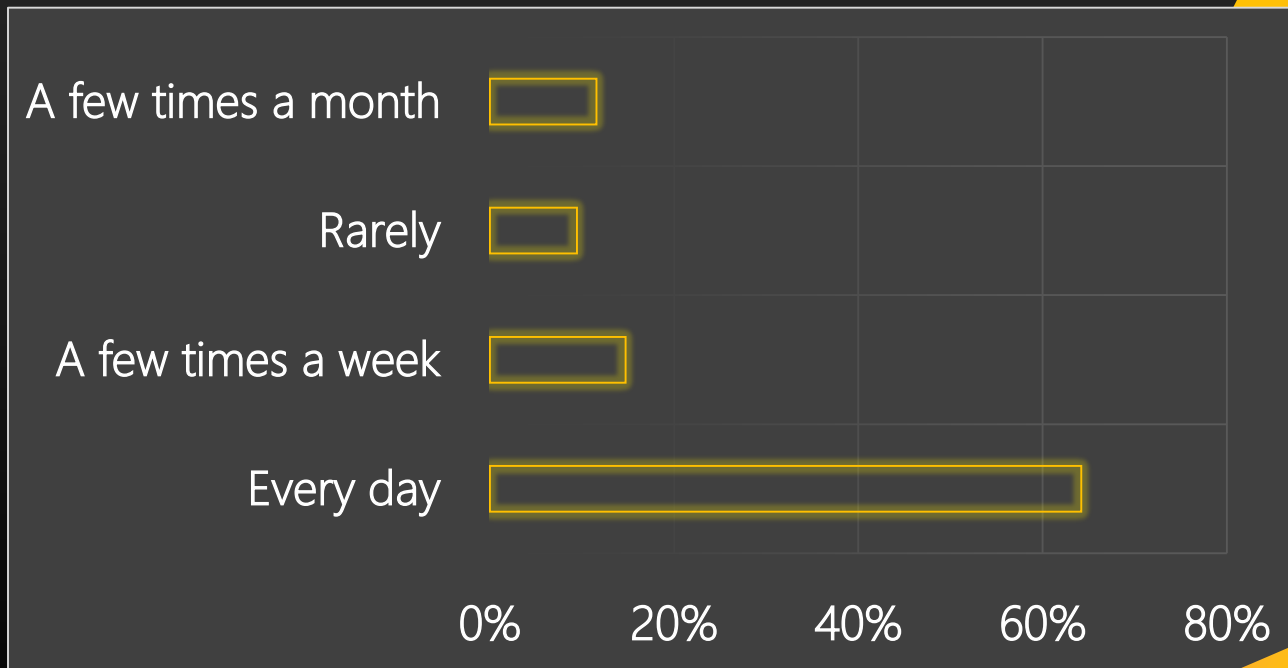
27.4%

5+ years

Q2 - Every year significant updates are made to GAIL to make the system more user-friendly. Do you agree that GAIL has improved over the years?



Q3 - How often do you use The Force GAIL?





Q4 - Why do you not utilize GAIL more often? (Select all that apply.)

The information I need is not in GAIL and/or our office uses another records system.

3 users

It is too difficult.

2 users

I have a co-worker/student worker who actively uses GAIL.

2 users

I don't need it to do my job.

11 users



Q5 - Which areas of GAIL do you use? (Select all that apply.)



89 users
Constituent Profiles



37 users
Direct Marketing Efforts



27 users
Events Management

Q5 - Which areas of GAIL do you use? (Select all that apply.)



34 users

RPM



31 users

BEE



26 users

Acknowledgements



Q6 - Is it easy to locate constituents in GAIL?

Sometimes constituents are easy to locate while other times they are not.



No, I often struggle to find constituents.



Yes, I can find constituents quickly.



0% 20% 40% 60% 80%



Q7 - Please provide a specific example of when you had difficulty locating a constituent.

There are many times that I am unable to locate a name based on a simple "soft search". Even with advanced settings applied, they will not appear. I have search individuals with the "check nicknames" option selected and unless I enter their middle name and last name separately, they will not appear with just looking for their name.

If their preferred name is their middle name and it is not listed as nickname please update the information or send it to the Records Team (records@uga.edu)! That will make it much easier to locate the person the next time without having to use middle name field.



Q7 - Please provide a specific example of when you had difficulty locating a constituent.

Someone has a nickname but that is not marked in GAIL. I wish it would often search combinations of first and last and middle names (i.e. first and middle and nickname while also searching last).

If their preferred name is their middle name and it is not listed as nickname please update the information or send to it to the Records Team (records@uga.edu)! If the nickname is not indicated in GAIL, you won't be able to enter that name into the nickname search box and find them. Also, less is more when conducting searches and switch out the name elements.

<https://support.dar.uga.edu/GAIL/advanced-search-options/>



Q8 - When you see information on a constituent's profile that needs to be updated, do you...(Select all that apply.)



44%

Update the information yourself

3%

Ignore it

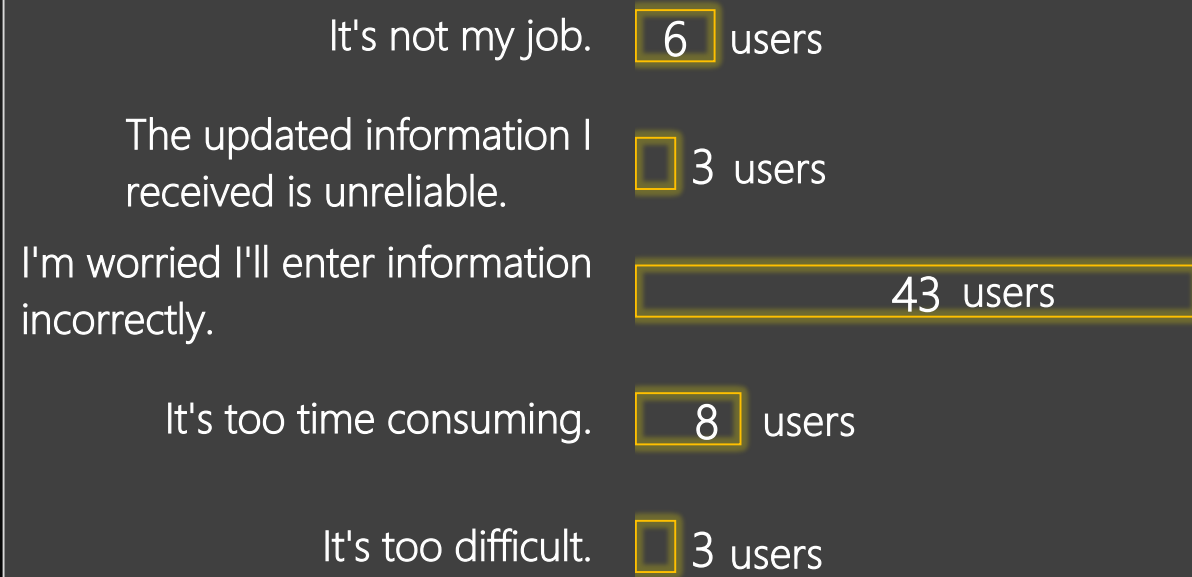
46%

Email records@uga.edu

5%

Have a co-worker or student worker update the information

Q9 - Why do you not personally update constituent information? (Select all that apply.)

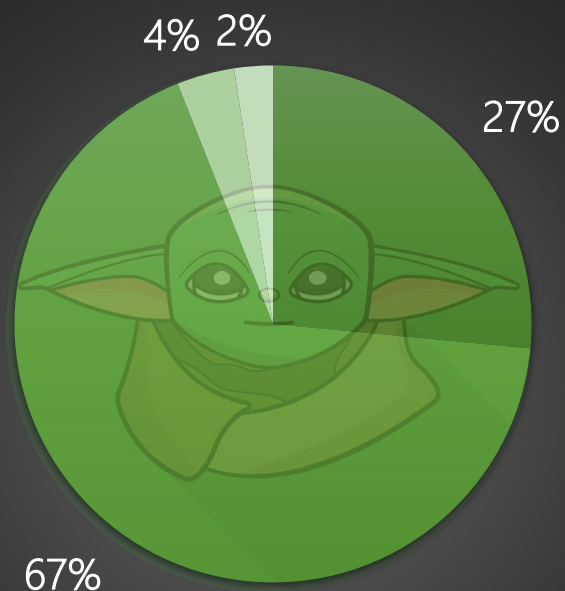


I find your lack of faith... disturbing...





Q10 - Overall do you agree that the data found on a constituent's profile is accurate and up-to-date?



■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



Q11 - Is there any constituent information that you would like to see updated more frequently in GAIL?

I have noticed that emails, employment information, and marital status is not updated as frequently. For example, I have had to update individuals who have been married for 20+ years in the system. I have also had to mark them as divorced even though they have been divorced for several years.

Share this information with the Records Team (records@uga.edu) so that these updates can be made in a timelier fashion. We very rarely receive information regarding divorced individuals and we currently do not have a service that provides that type of information so we depend on those who know the constituents best. A Schedule of Data Updates is available here:

<https://support.dar.uga.edu/GAIL/team-spotlight-alumni-records/>

Employer information is likely the most inaccurate consistently.

This will be an ideal candidate for the Records Update Request function. If new employment is found we can update that based on the request from the user.

It seems that some emails are marked inactive, etc. even after constituents confirm the address is correct/preferred and that is noted.

If these are business email addresses it likely will remain bounced/inactive based on Spam rules of the company/organization. If it is a personal email address and we are notified we are happy to re-activate it.

Q11 - Is there any constituent information that you would like to see updated more frequently in GAIL?

I have found that some end dates for "do not mail" and "do not email" codes fail to take effect as recorded, and constituents remain under those statuses and inaccessible.

For "Do Not E-Mail", there are times when people have globally unsubscribed from emails that have been sent from BBIS lists (not associated directly with a constituent). In these situations, removing the "Do Not E-Mail" will not make this constituent accessible through e-mail in CRM. In these situations, the email recipient can hopefully continue receiving emails if they visit a communication preferences page from a previously sent email and choosing to remove their solicit code that way. This method does not always work, and at times requires the constituent writing an e-mail to us requesting to start receiving e-mails again. There are other times where constituents have multiple hard or soft bounces on record for that specific email address. This can often happen with private e-mail servers where greater protections are in place (we often see this with law offices).

Can you add a D.V.M. suffix search? I think right now it is a combined DVM MS or PhD option. Contact information is difficult with CVM alumni. People move clinics, and our alumni are not great about keeping us up-to-date. I know employment is always a struggle.

We do not typically use DVM or D.V.M. as a suffix especially for UGA graduates. That information would come from the degree field and the title is typically used to indicate Dr. We can add a new suffix of "D.V.M.", but the search wouldn't find users who had "D.V.M." as only part of their suffix. It would only find users who had exactly "D.V.M." as their suffix since those searches are based on a code table, and not by a partial string. We could potentially add Suffix to our Constituent List builder, which would offer greater flexibility when searching by suffix.

Q12 - How often do you create Direct Marketing Efforts?

**Help us
Client Services!
You are our
only hope!**

Q13 - Did you answer: ONCE
or A FEW TIMES A YEAR?
We recommend that you and
your team attend a refresher
class to develop your Direct
Marketing Efforts process with
us! Email ejclary@uga.edu for
more information.



22%

Once a year



38%

A few times a year



25%

Monthly



15%

Weekly



Q14 - Do you currently track any data or send communications outside of the GAIL environment?



YES, 30%



NO, 70%

Q16 - Please rate each step of the Direct Marketing Effort as either easy (1) or difficult (5).



*The mean for each step is displayed with standard deviations.



Q17 - Which online resources do you use to help guide you through this difficult Direct Marketing Effort step(s)?

10

G-WIZ

4

I have trouble locating resources to help me

7

PDF Guides

3

Video Guides



Q18 - How often do you create Events in GAIL?

**Help us
Client Services!
You are our
only hope!**

Q19 - Did you answer: ONCE
or A FEW TIMES A YEAR?
We recommend that you and
your team attend a refresher
class to develop your Direct
Marketing Efforts process with
us! Email ejclary@uga.edu for
more information.

21%

Once a year

36%

A few times a year

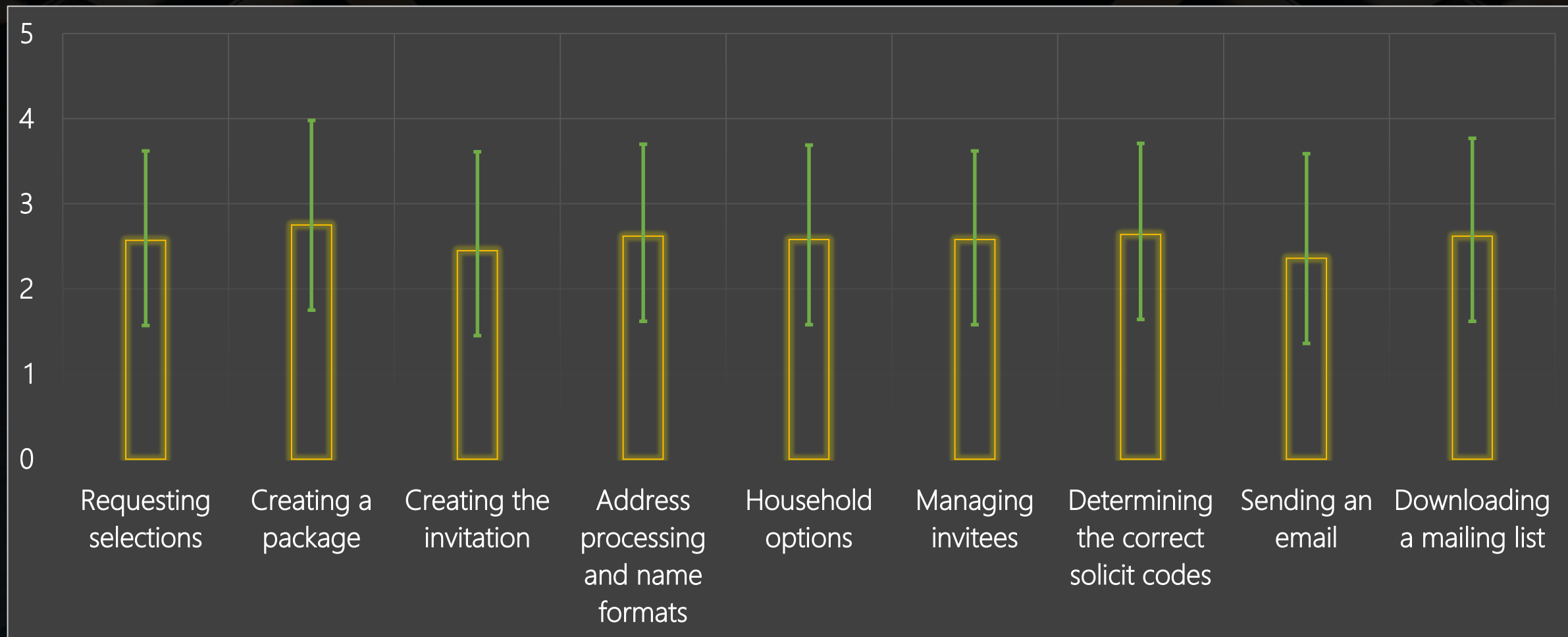
31%

Monthly

10%

Weekly

Q20 - Please rate each step of the Events Communication as either easy (1) or difficult (5).





Q17 - Which online resources do you use to help guide you through this difficult Event Communication step(s)?

4

G-WIZ

0

I have trouble locating resources to help me



5

PDF Guides

2

Video Guides

Q22 - Do you use smart queries to send follow-up communications to your invitees, registrants, or attendees?



10 users

Yes, I love smart queries!



3 users

I send follow up communications using another method



4 users

I was unaware of this feature.

Q24 - How often do you create emails in BEE?



2 users
Once a year



8 users
Few times a year



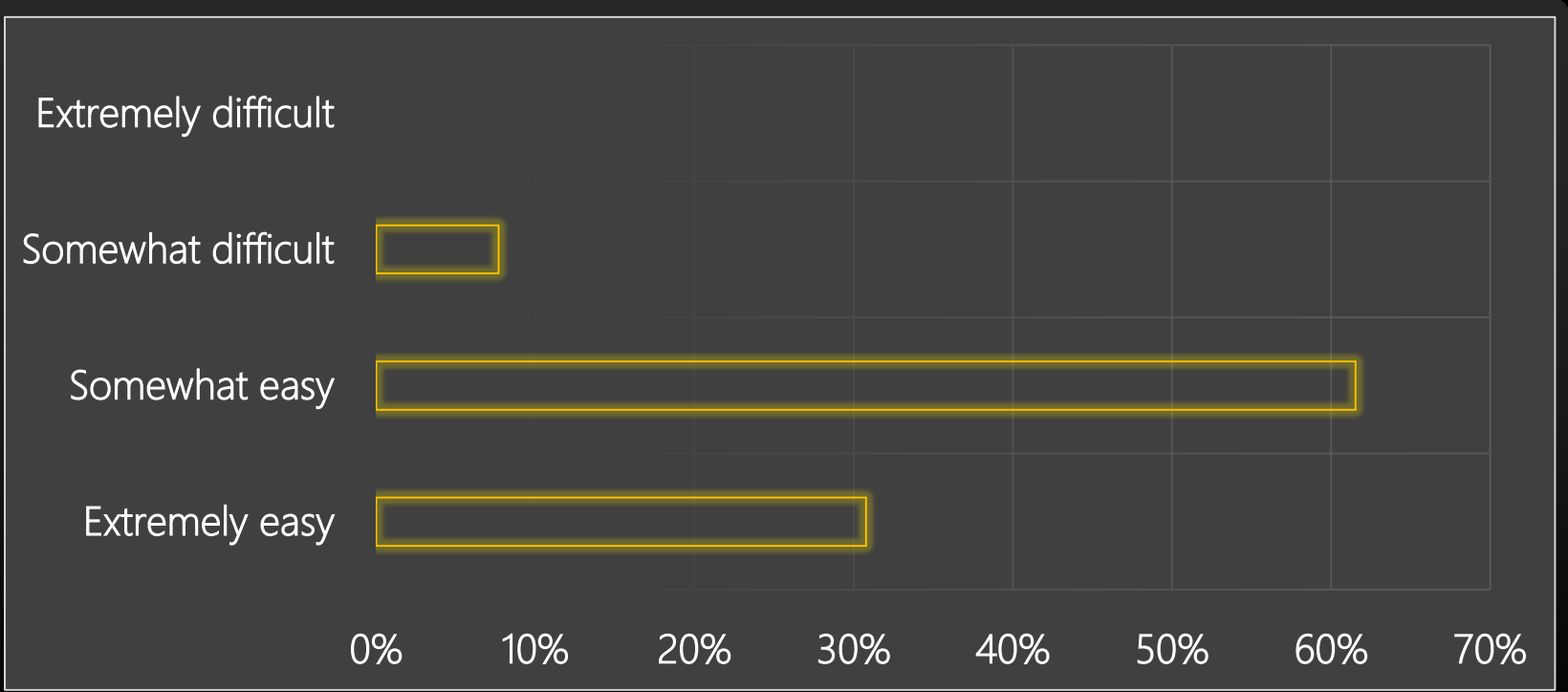
8 users
Monthly



8 users
Weekly



Q25 - Overall, how easy is it to create an email in BEE?



FONTS

EMBED
TOOL

UNSUBSCRIBE

MERGE TAG

Q26 - Please detail which parts of BEE you find difficult.

The customization is limited. You cannot embed gifs or mp4 video files for added design. Images have to be edited outside of the email in a separate editor so you cannot see how it will look until after you upload it back to the email.

The June update for BEE allows for GIFs to be embedded. Due to file size limitations in accepting/rejecting emails, ThankView is recommended for videos/



Q27 - Which online resources do you use to help guide you through this difficult BEE step(s)?

1

G-WIZ

1

There are not
sufficient resources to
assist me

0

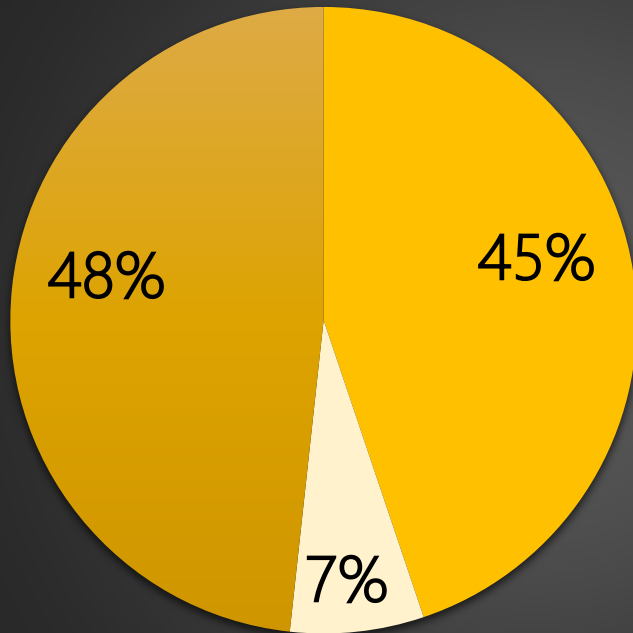
PDF Guides

0

Video Guides



Q28 - In your current fundraising position, do you manage a portfolio of prospects with corresponding plans in GAIL?



- Yes, I have prospects and plans.
- I am a fundraiser but I don't establish plans in GAIL. I use: _____
- I do not have my own portfolio, but I assist a fundraiser who does.



**STAR
WARS**



*GO
GATORS!*



Q29 - How do you track pending activity within your portfolio? (Select all that apply.)

I have a co-worker who tracks this for me

2 users

Excel spreadsheet

3 users

Outlook Calendar

7 users

Development Workspace

6 users

My Fundraiser Page - Pending Activity Tab

8 users

0 2 4 6 8 10

*GO
DAWGS!*





Q30 - Are you currently using the GAIL Acknowledgements system to process thank you letters to your donors?

YES, 65% NO, 35%

Q31 - Does your current acknowledgement report(s) have all the information you need to successfully send thank you letters?

YES, 100% NO, 0%

RECEIPT

GIFTS

BIRTHDAYS

THANKVIEW

Q33 - What process are you currently using to write thank you letters to donors?

Manual process or DAR provides the list to us. We send individual thank you notes or Handwritten letters to alumni, but not a huge quantity.

I have used GAIL to mail birthday cards.

I imagine Development uses this system on our (President's Office) behalf, but I couldn't say for sure. They upload our acknowledgment letters under interactions.

If you would like additional help with these processes and see how GAIL can improve them, please reach out to Client Services!

Q34 - When was the last time you attended a GAIL training class?



17%

Within the past few months.



18%

Within the last year.



65%

It has been more than a year.



Q35 - Please rate the experience of your last GAIL training class (if within the past year).

67%

Excellent

3%

Average

30%

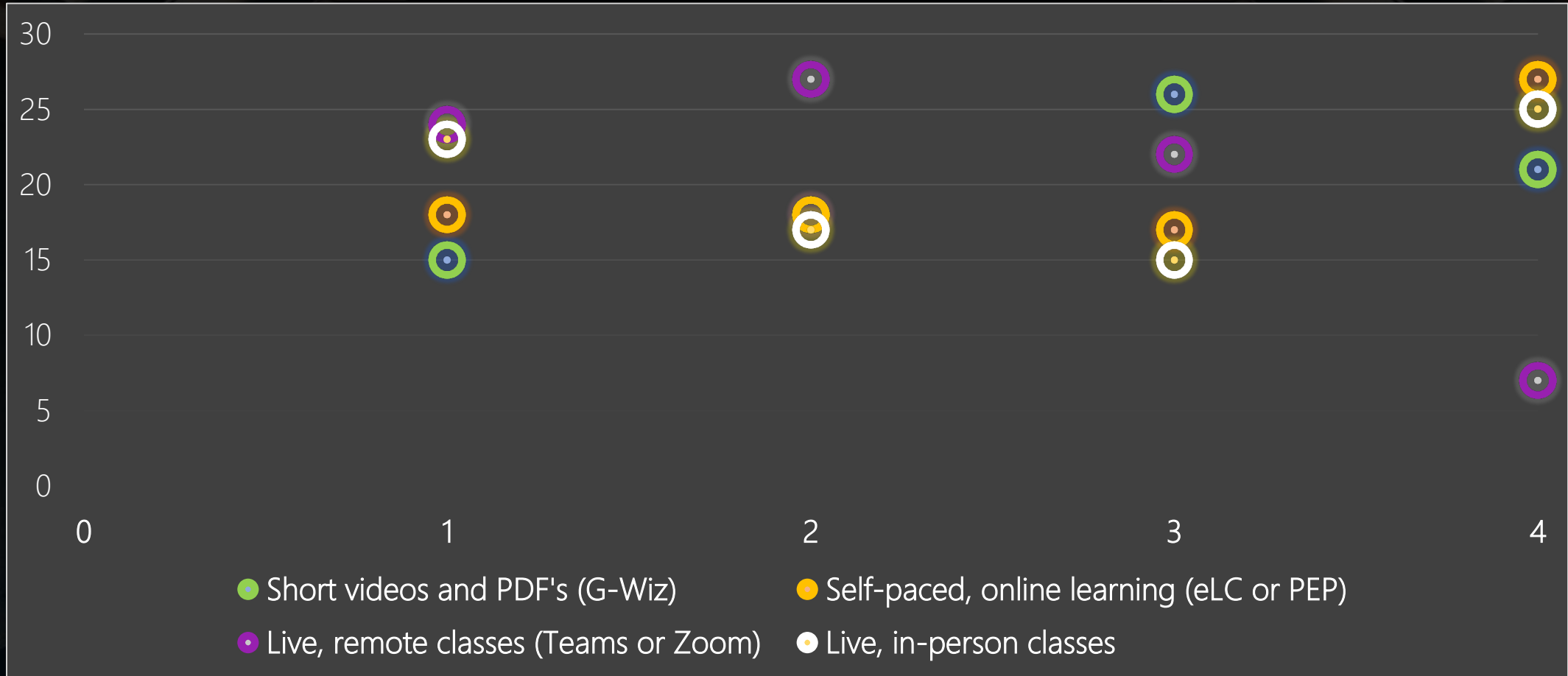
Good

0%

Poor or Terrible



Q37 - From the list provided, rank 1-4 your preferred method of receiving training in GAIL. (1 being the most and 4 being the least.)





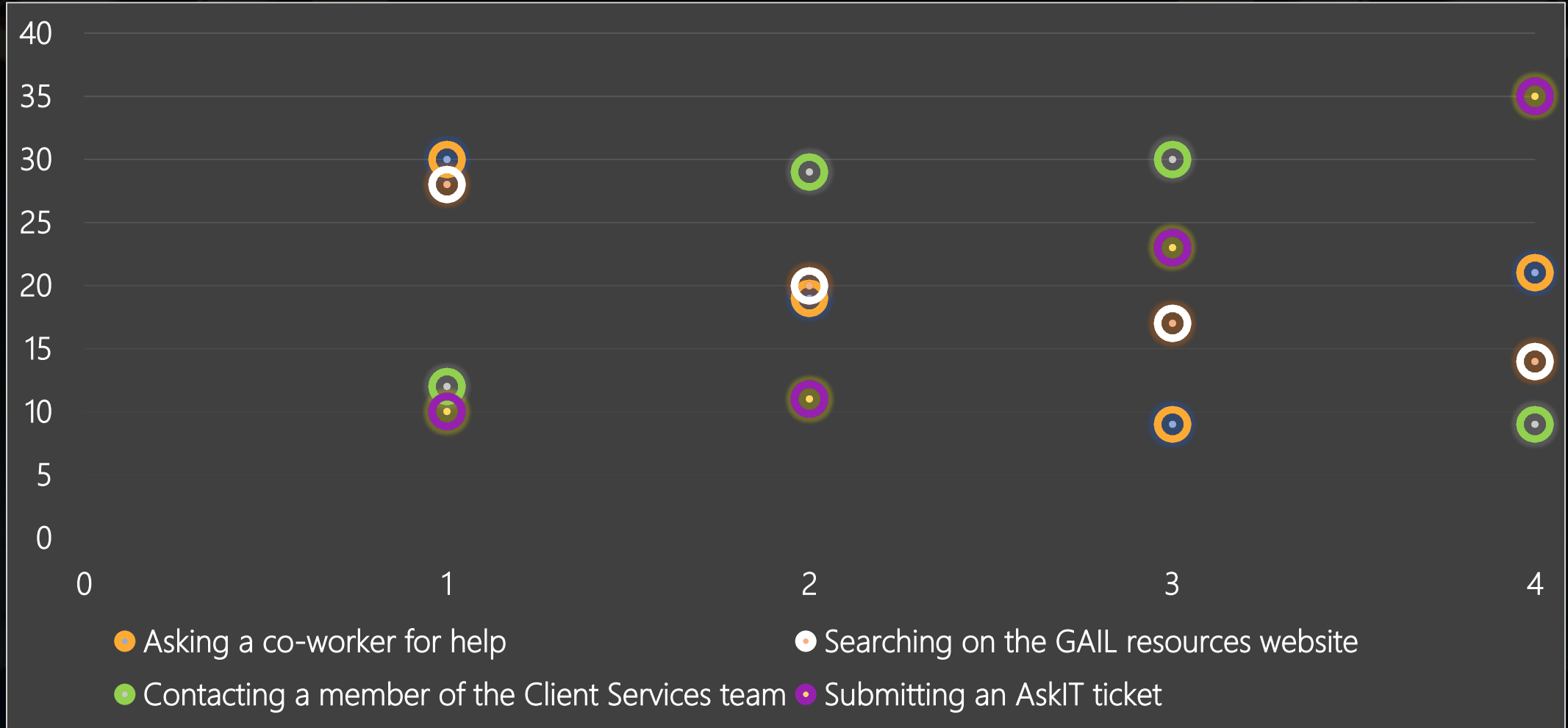
Q38 - What specific short video or PDF content would you look like to see more of?

How to send thank you letters via GAIL
We will work to include this information in our new materials for Acknowledgments & Stewardship classes.

How to delete a BEE email (one that was accidentally created)
The June update for BEE allows for this. We will work to include this information in our new materials.

How to design an email (tips and tricks and advice - why does it not hold the format?)
Thank you for your feedback! We will work to include this information in our new materials.

Q39 - From the list provided, rank 1-4 your preferred method of getting help with GAIL. (1 being the most and 4 being the last resort.)



Q41 - Would you like to provide any final feedback and/or suggestions for improvements to GAIL?

GAIL needs a comprehensive prospect/donor identification query tool that is easy to use to replace Reeher and Qlik
Agreed! We hope to implement this feature in the near future.

I need mailing lists without missing parts of the address.

You should not use the General User Preference option when pulling postal addresses. For more information on Address Processing, please click here: <https://support.dar.uga.edu/GAIL/recommended-address-processing-name-format-settings/> and reach out to Client Services for assistance when needed.

It would be great if there was an easy way to run a simple report on total funds raised (e.g. on an annual basis, with historical data by year). maybe there is and I just don't know about it.

You can run current year fundraising totals using the Development Detail Report and Fundraising Units: <https://support.dar.uga.edu/GAIL/new-fundraising-reports/> We do have plans to have reporting covering multiple fiscal years in the future, but at this time you can submit an AskIT request and we will be happy to get you the information you need.

As someone who has to look into revenue details daily, I would love if fund designations and donors who received recognition credit were hyperlinked to the fund page and the donors' GAIL records, respectively.

Agreed! We hope to implement this feature in the near future.

Q41 - Would you like to provide any final feedback and/or suggestions for improvements to GAIL?

Additionally, I would like it if name formats updated on BOTH members of the household at once instead of having to edit each name format on each record separately. As someone who has to update name formats regularly, I have seen so many donors whose spouses have inconsistent name formats across each record. Having to update each spouse's record separately leaves a lot of room for error.

Agreed! We hope to implement this feature in the near future.

Link married people's joint salutations - instead of having to manually update each person's; Hyperlink constituent's profiles under recognition credit within the transaction summary; Hyperlink to fund IDs within a gift; In revenue tab recognition history: have a quick way of seeing if there are any vanguard images within a gift.

Agreed! We hope to implement these features in the near future.

Mapping feature that is easy to use/like Reheer!! For frontline fundraisers this was the most crucial part of Reheer that I am now missing. Even if the mapping feature does exist in GAIL, the information it gives you is not nearly as pretty/user friendly as Reheer was.

We have a Tableau map in GAIL for Graduates. It is under Analysis > Analytic tools section > Mapping. That option has been available since 10/23/2020. Please submit a ticket and provide some more examples of changes that would be helpful!

Q41 - Would you like to provide any final feedback and/or suggestions for improvements to GAIL?

Some type of reporting dashboard would be helpful. Or an after-event email etc... We are trying to have some metrics as part of the evaluation process to see if our events/acknowledgments...

We are working on event dashboard reporting. If you give more details, we can certainly look into it further with your specifics.

I would like to know how to look up large numbers of alumni based on specific criteria, e.g. "all MPA alumni who live in the Atlanta area". Would running these types of queries be available to me if I had additional GAIL training?

We are currently working on a prospecting tool and users will be able to use a Tableau dashboard to search on criteria such as what has been provided. The Constituent Custom Search allows this, however it is not meant to produce an Excel file.

Referring specifically to companies and foundations, it would be great if a constituent's profile could be pulled with or without "the." For example, in GAIL the profile name is "The Bernard Osher Foundation." However, if you do not include "the" it does not pull up, making it seem as though the foundation does not exist in GAIL, even when "include fuzzy" is chosen. This occurs with several foundations and companies we work with. Not sure if this is a possibility, but it would be great if it was.

*You can utilize the * in all organization searches to circumvent this issue. For example, use *Bernard Osher in the search boxes – either Name/Lookup or Last/Org/Group.*

Q41 - Would you like to provide any final feedback and/or suggestions for improvements to GAIL?

Is there a way to add a tile at the top of a donor's profile that gives indication to where they are at with a current pledge. I recently learned where this information is stored under revenue, but it is buried under multiple layers. It would be so helpful if there was a tile that showed: 1) if they have a current pledge 2) how much they have left 3) when it will be paid in full. I know this is a big ask, but a girl can dream!

Agreed! We hope to implement this feature in the near future.

Ability to edit Paciolan ID's. Sometimes don't have the time to reach out to Client Services. Quick edit, that would benefit all.

These changes can be requested through Records or Gift Accounting for Athletics. The new, quick 'Update Request' option will help you with this: <https://support.dar.uga.edu/GAIL/new-request-constituent-update/> or you can submit a request to records@uga.edu.

I wish Bee editor was better - more format options some templates we could search for and I wish it held formatting when copied and pasted outside text into an already formatted block. I also wish it did not automatically refresh every so often it is frustrating when I am mid task and something doesn't stick because of it.

We will look into reducing the refresh rate. The auto refreshes are in place in order to keep the session alive and prevent the email from being completely lost. As far as paste formatting from an outside source goes, this is an outstanding feature request with the vendor.