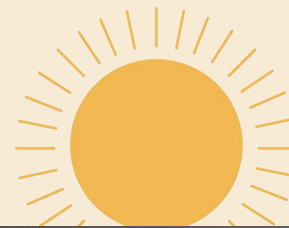


After the Confetti

Stabilization Strategies for CRM Success



Welcome



Jeff Baynham

*Associate Vice Chancellor,
Advancement Services
NC State University*



Kate Maloney

*Lead Project Manager, Project
Management and User
Services
Northwestern University*



Shalonda Martin

*Executive Director, Advancement
Services
Pomona College*



Caroline Chang

*VP, Advancement
Kindsight*



Agenda

Introductions

01

Sustain

04

Prepare

02

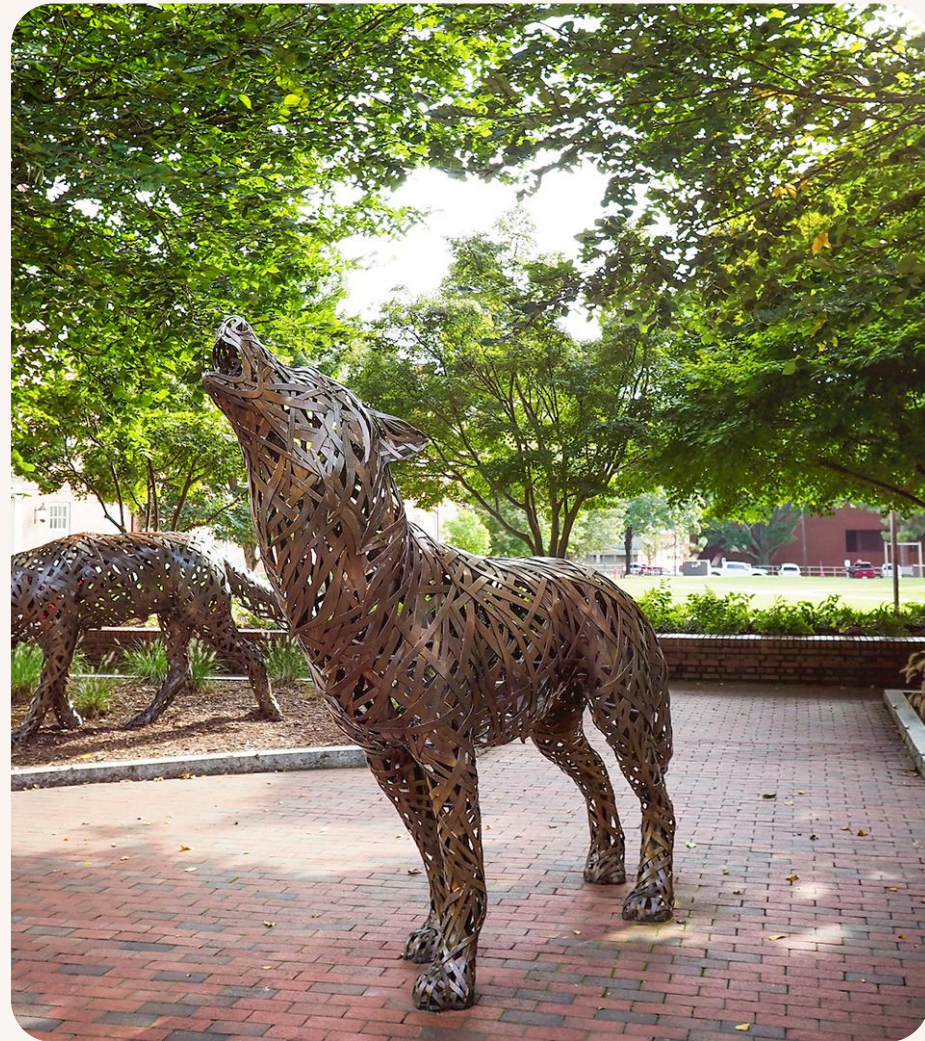
Reflect

05

Survive

03

- R1 research institution located in Raleigh, NC
- 39,600+ Students / 10,200+ faculty & staff
- 312,000+ Alumni / 895K+ records
- \$2.54B Endowment / \$366.8M fundraising FY25
- Previously on Ellucian Advance Web for 30 years
- 22-month implementation, went live on 2/10/25
- Implemented Salesforce Sales Cloud with Kindsight ascend
 - **Blackthorn, GiveCampus, CRM Analytics, Tableau, Initium, OnBase, Double the Donation, OwnBackup, Gearset, Cdata**
- Branded our ascend instance **Lobo**
- 350 licensed users



Northwestern University

- Private, R1 research institution located in Evanston, IL
- 22,000 students / 8,800 Faculty/Staff (360 ARD)
- 260,000 contactable alums
- \$14.3B Endowment / \$1.01B NGC FY25
- 22-month implementation, went live on 5/5/2025
- CATracks Ellucian Advance→CatConnect
 - **Salesforce Service Cloud with Kindsight ascend**
 - GiveCampus, Blackthorn, Marketing Cloud, Portal/Connect, Formstack, BI, Tableau, CRM Analytics, SF Maps, OnBase, SmartyStreets
- 548 users



- Small, private, liberal arts college, Claremont, CA
- 1,732 enrolled students/903 faculty & staff
- 27,000+ living alumni/169k+ records
- \$3.01B endowment/FY25 Fundraising: \$82.8M
- Previously on Blackbaud's RE 7 for 15yrs
- Implemented Salesforce Sales Cloud with Kindsight ascend
 - Blackthorn, GiveCampus, CRM Analytics, Tableau, Onbase, Double the Donation, OwnData, SmartyStreets, SF Maps, Marketing Cloud, CVENT, VanillaSoft, Workday Integration, Inbox
- 92 licensed users



Prepare



Setting the stage with expectations, readiness, and transparency

“Continuous improvement is better than delayed perfection.” – Mark Twain

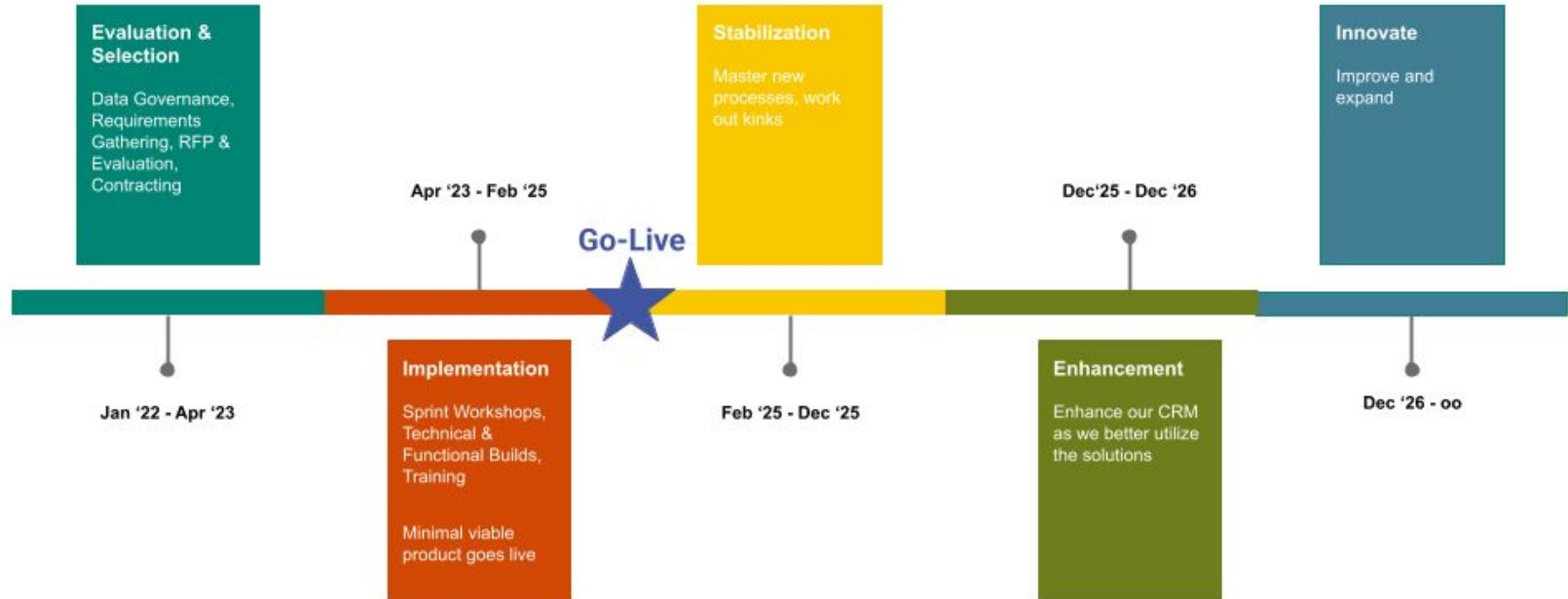


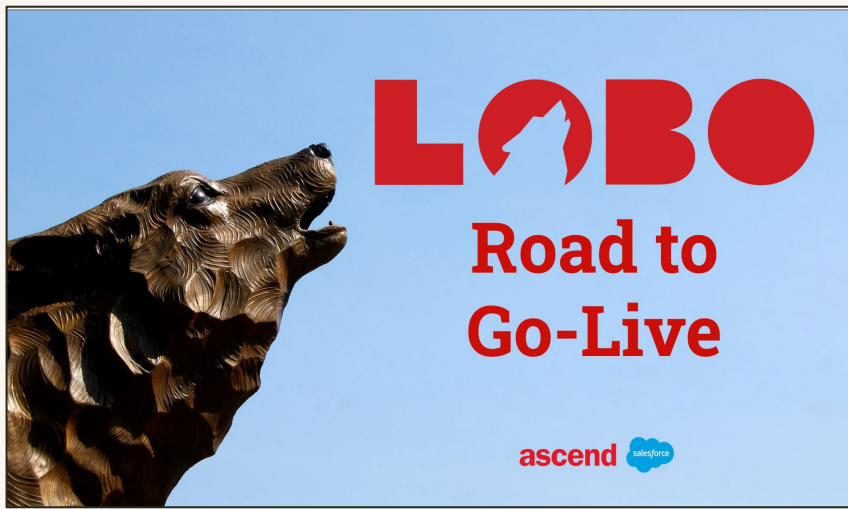


Prepare

- Change management
- Operational readiness
- Training

Selection, Implementation & Beyond



A photograph of a crowd of people at a sports event, with many individuals making the 'rock on' hand gesture. The crowd is out of focus, with red and white clothing visible.

**NC STATE
UNIVERSITY**

You can help!

- Participate
- Allow simplification
- Manage expectations
- Exercise patience
- Be an advocate!

- Timeline /remaining activities
 - UAT, Data Migration, Blackout
- Reporting
- Training
- How you can help



NC STATE
UNIVERSITY

Agenda

- Project Recap
- Training & Support
- Blackout Period
- Lobo at Go-Live
 - Functionality Available
 - Known Gaps/Issues
- Reporting
- Requests and Releases
- Q&A





NC STATE

Go-Live Functionality

By February 10, 2025

Ready at Go-Live

- Opportunities (Proposals) for Major Gifts
 - Custom referrals process
 - Recording household Strategy
 - Contact Reports
 - Support for multi-unit/designation endowment, planned) via "Opportunity"
- Assignments
 - Ability to self-assign
 - Primary and Secondary Relationships
 - Addition of Engagement Officer
- Gift Processing
 - Giving society calculations
 - Chancellor Circle
 - Pullen Society

Lobo Reporting Development Log

	A	B	C	D	E
1	Solution Name	Description	Platform	Current Status	Go-Live Planned Status
2	Opportunity Pipeline Solution	Tracking opportunities	CRMA	Complete	Yes
3	Development Metrics Solution	Tracking officer and unit KPIs and development metrics	CRMA	Complete	Yes
4	Service Indicator Exclusion List	For checking service indicators on constituents	Lightning	Complete	Likely
5	Constituents Marked Deceased	Tracking recently deceased constituents	Lightning	Complete	Yes
6	WolfTrek Prospect Mail List	Mail list for WolfTrek Program	Tableau	Complete	Yes
7	Monthly Institutional Report Suite (Red and Blue Reports)	Tracking institutional Gifts and New Commitments	Tableau	Complete	Yes
8	Development Activity Congrats Data Push	These are monthly congratulations provided via A	SAS	Complete	Yes
9	Daily Modified Addresses	For validating daily address changes	Lightning	Complete	Yes
10	Campaign Readiness Dashboard	For strategic planning related to next NCSU philan	Tableau	Complete	Yes
11	College Fundraising Dashboard	For tracking of college priority designations and F	Tableau	Complete	Yes
12	Batch Proof Reports	A report used to validate transaction batches	Lightning	Complete	Yes
13	OverDue Pledges Report	Used for identifying delinquent pledge installments	Lightning	In Development	Unlikely
14	Capital Projects with Fundraising Schedules	For tracking these projects for University Controlle	Lightning	Complete	Yes
15	Celebrating Transformation Dashboard	For tracking this priority initiative within ULA	Tableau	Complete	Yes



LOBO

Today marks an exciting milestone as we officially launch Lobo, our new CRM. This launch is a significant step forward, and we couldn't have reached this point without your patience, support, and partnership—thank you!

We appreciate the time you've dedicated to learning the new CRM and helping us build a system that works for all of University Advancement. This initial launch of Lobo serves as a foundation for us to build upon. Together we'll refine and improve it to meet our shared goals. Your feedback and collaboration will be essential in making Lobo the powerful tool it's designed to be.

Here's to new beginnings and building something great together!

Brian C. Lingo

NC STATE





50+ items • Sorted by Article Number • Filtered by All knowledge - Article Title, Publication Status • Updated a few seconds ago

	☐	Art... ↑ ▾	Article Title ▾	Summary ▾	Modified Date ▾	Pub... ▾	Ar... ▾	
1	☐	0000010...	CatConnect100	CatConnect100 is designed to equip you with the basic kno...	6/26/2025, 12:53 PM	Published	Job Aid	▾
2	☐	0000010...	CatConnect Terminology	A list of definitions for some of the most common terms enc...	4/21/2025, 11:30 A...	Published	Job Aid	▾
3	☐	0000010...	CatConnect Constituent Types	CatConnect Constituent Types: descriptions, automations, an...	4/8/2025, 1:39 PM	Published	Job Aid	▾
4	☐	0000010...	CatConnect Knowtify	CatConnect Knowtify information	8/1/2025, 8:18 AM	Published	Job Aid	▾
5	☐	0000010...	CatConnect Service Indicators	Service indicators managed in the Service Indicator object to...	4/8/2025, 1:59 PM			▾
6	☐	0000010...	CatConnect: Adding a Service Indicator to a Constituent or O...	Instructions for members of the Gift and Record Services tea...	4/11/2025, 2:13 PM			▾
7	☐	0000010...	CatConnect: Creating and Managing Custom Salutations	Instructions on how to create and manage custom salutation...	7/16/2025, 8:58 AM			▾
8	☐	0000010...	CatConnect: Involvements	Involvements refer to any form of engagement a constituent...	9/25/2025, 10:03 AM			▾
9	☐	0000010...	CatConnect: Adding Affiliations (GRS Only)	In CatConnect, an affiliation refers to any connection betwee...	5/21/2025, 12:01 PM			▾
10	☐	0000010...	CatConnect: Global Search Bar	The Global Search Bar in CatConnect is a powerful tool that ...	4/10/2025, 10:26 AM			▾
11	☐	0000010...	CatConnect: Finding List Views	A list view in CatConnect allows you to organize and view re...	4/18/2025, 2:47 PM			▾



▼ Creating Lightning Reports

▼ Scribe: Create a Lightning Report



Create a Lightning Report in CatConnect

This guide provides a step-by-step approach to creating effective

Bingo Card ID 018

Go to Office Hours	Attend All 3 UAT Sessions	Ask Linda a Functional Question	Create a New Record (any type)	Reset your Eyes during Break
Install SF Favicons	Pass an Acceptance Criterion	Jeremy says: "I sent you a link"	Log into UAT Sanbox	Message the Group Chatter
Submit an Enhancement Request	Install SF Authenticator	Go See James Turrell's "Skyspace"	Gabby says: "No problem!"	Forgot Your Password
Rodger says the word "Future"	Eat Free Lunch	FREE SPACE	Drink Coffee	Bring your Laptop Charger
Ask Matt a Data Question	Make a Bug	Stretch during Break	Take Snacks Home	Take a Walk during Break

myfreebingocards.com

"Fear not, Your Majesty," proclaimed the new solution!"

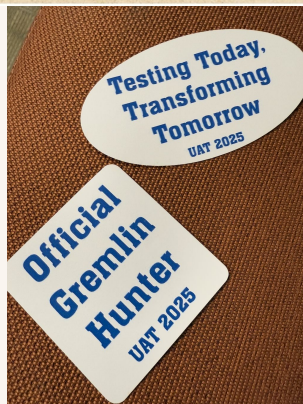
WE NEED TO HEAR
EXACTLY WHAT YOU
NEED



Once upon a time in the Kingdom of Sagehens (also known as Pomona College)...
The kingdom was preparing for its greatest **Grand Challenge** yet. It was time to go...
BEYOND THE GATES! But alas, they faced a grave dilemma—their ancient and crumbling
Legacy Ledger, held together by duct tape, expired coffee, and hope, was no longer fit for
such a noble quest.

"This thing can't handle our campaign!" cried **Queen Watson**, her royal brow furrowed in concern.

"Fear not, Your Majesty," proclaimed the Wizards of Advancement. "We shall seek a new solution!"



CRM Implementation Playlist

a playlist that conveys the range of emotions that a...

 **Shalonda Martin** • 56 songs, about 3 hr 45 min

Eye of the Tiger

4:05

Happy - From "Despicable...
Pharrell Williams

3:53

Under Pressure

Queen, David Bowie

4:04

Harder, Better, Faster, Stro...
Daft Punk

3:46

We Will Rock You
Queen

2:01

Lean on Me

Bill Withers

4:17

Survive



Triage, trust, tiny wins, and finding your rhythm after launch

“Rome wasn’t built in a day, but they were laying bricks every hour.” – John Heywood





Survive

- Change management
 - Triage and response framework
 - Ongoing support & training
 - Fatigue
- 



	A	B	C	D	E	F
1	 Known Issues and Defects				Feature Backlog	Reporting Log
2	Title	System Area	Description	Impact and Considerations	Case / Work Item #	Status
3	Paid Events in Blackthorn	Events	Configuration of the financial feed for paid events in Blackthorn is not complete	We are not able to create paid events in Blackthorn yet.		Active
4	Closing funded opportunites	Prospect	We are working on issues within gift processing screens to allow staff to link transactions to opportunities so they can be closed.	Opportunities funded since go-live have not been closed yet.		Active
5	Referral Reports for Suspect Identification and Qualification Outcomes	Prospect	Migration update will resolve issues with being able to accept or decline referrals. Training for all users will be available the first week of March.	These reports will be available for units and teams ASAP once reporting has been finalized. Units/teams will be notified with a link to their respective report, along with a procedure for viewing the referrals.	N/A	Active
6	New Spouse Relationship: Merge/Move Constituent Household Issue/Defect	Biographical, Gifts, Prospect	When adding a new spousal relationship to a record, where the "Merge Household" or "Move Constituent" option was selected along with the current preferred address being set as the "NCSU Merge Spouse and Partner Address." After saving, the original record no longer retained the current preferred address, but the address was instead added to the spouse's record. This resulted in the spouse's record now having two current preferred addresses, and the loss of address data on the first record.	Householding doesn't function properly.	1045	Active
7	CFR Opportunity Owners Need to be Exempt from Timeboxing	Prospect	CFR opportunities may expire after six months		3377	Active
8	Some migrated opportunities in cultivate are showing Qualified Dates in the future when they are already qualified.	Prospect	The date in the Qualified Date field is matching the End Date for the Opportunity in Cultivate & Open rather than the actual date of qualification from Advance. This will affect CAR and qualification outcome reporting counts.		1180	Active
				Holding on all updates to the Opportunity Owner in the stages of Cultivating & Open		



Lobo Backlog



Saved to Drive

File Edit View Insert Format Data Tools Extensions Help Accessibility



Share



100%



123

Arial



11



B2

fx Appeal: Create Automation for Motivation Code (Appeals)

Summarize this table

	A	B	C
1	Ç	Subject	Description
2	W-002303	Appeal: Create Automation for Motivation Code (Appeals)	Determine Motivation Code format (equivalent of legacy Appeal Code). Ascend/SF requires uniqueness.
3	W-001679	Area of expertise/industry - possible fields to extend Affiliation object	If pursued, this would be for the purpose of being able to pull data based on Alums employment information according to areas of e sake of aligning with mentees and for related career services uses.
4	W-002680	Campaign: Add Email Metrics on Campaign	Case: 00001199 Add email Engagement Metrics on campaigns tab. How would we identify the campaign record and link it to every sent in association?
5	W-000871	Campaign Member response tracking	Determine: 1. Which Campaign Types receive trackable responses that NC wants to record. 2. Determine list of response values for qualifying Campaign Type value
6	W-001942	Campaign Pillars/Designations	Not ready to build now, because NC States next comprehensive campaigns quiet phase would not start prior to 2027; nevertheless framework can be identified. Likely a custom picklist field on the Designation object that ties the Designation to a specific pillar with Campaign, facilitating aggregate reporting by pillar. Also, a custom field on the Designation Details object...
7	W-000779	Case Management - Clearing Accounts	Setup Cases to support process to manage clear account resolutions.
8	W-000778	Case Management - Committee Updates	Setup Cases to support process to collect committee member updates.
9	W-002304	Field Change History Log (Audit Changes)	Develop and maintain document of fields that need field change history.
10	W-001678	Identifying Alumni Legacies	Possible constituent (formula?) field to flag a constituent as a legacy; possible Ascend indicator, if desired and if suitable icon available
11	W-000783	Intake Contact Report via Email	As a person who manages relationships, I would like to send email communications to an inbox that would auto-create a contact record if interaction gets lost. This is a feature we have with Blackbaud FPM using a BCC email address.
12	W-001941	Integrated grant payments	(Nice to have) - ability to import data from finance to create payments against grant pledges.
13	W-000702	Naming Opportunities	
14	W-002289	Paciolan Integration	Huron seeking to get from NC a view of the data that comes out of Paciolan (from the perspective of the typical starting point for so integration); note that SOW specifies only priority points and seating data, so a change order of some sort may be required because integration involves gift information.
15	W-000869	Pledge Reminder Queue and Routings	The legacy pledge reminder routing queue/process
16	W-001366	Possible Integration with EPACK (Simplicity)	(Might, alternatively, be replaced by something build on Experience Cloud.
17	W-002785	POST GO LIVE - Add Designation Lookup to Opportunity	POST GO LIVE 1. Add a designation look-up to Designation Opportunity. It would stand on its own and not validate against the business

114 Days Live @ NC State

So far, users have logged 583 cases related to general questions, permissions, defects and issues (not including enhancement requests) and have resolved 323 ✅. The triage phase is largely behind us, and we are now focusing on more meaningful and strategic improvements. (Yes, the smaller annoyances are still with us.)

 **Jeff Baynham** • You
Associate Vice Chancellor, Advancement Services at North Caro...
3mo • Edited • 🌐

👉 Lobo at 114 Days: Where We Are Now

I am long overdue for an update, and I know many of you have been waiting on pins and needles 🙄. We are still actively stabilizing our [Salesforce Kindsight](#) Ascend CRM (Lobo) as we work through implementation issues, including design decisions that didn't hit the mark, inefficient workflows, missed needs, and lingering data migration errors. We are also starting to address functional gaps that did not make the cut for go-live.

So far, users have logged 583 cases related to general questions, permissions, defects and issues (not including enhancement requests) and 323 ✅. The triage phase is largely behind us, and we are now focusing on more meaningful and strategic improvements. (Yes, the smaller annoyances are still with us.)

Our volume has dropped to a more manageable level 📉, though we still have more requests than our resources can handle as quickly as we would like.

As we move forward, focused and transparent, we have implemented a new triage and prioritization process, which includes our Lobo Triage Committee (LOSC). This group of 15 subject matter experts across Advancement selflessly evaluates larger requests based on user impact, efficiency gained, mission alignment, and technical feasibility to help guide resource allocation and prioritization.

We heard from our peers that post go-live is not the victory lap, but it is where the real work begins. And we have definitely found that to be true. I am so proud of my Advancement Services team for their continued dedication past go-live to keep shaping Lobo into what we all envisioned. 🙌

Finally, our [North Carolina State University](#) advancement colleagues continue to be patient and supportive throughout this phase. I credit that to strong change management and consistent communication that demonstrates progress and transparency. Thank you, colleagues! 🙏

Here is to continued progress, fewer surprises, and a more stable Lobo 🚀

#HigherEdCRM #Salesforce #Advancement #ChangeManagement
#Lobo #NCState #ThinkAndDo #Kindsight #ascend

👍👍👍 Corey Snow 🗨️ and 98 others 21 comments · 1 repost

Support Case Priority

		Impact			
		Critical	High	Medium	Low
Urgency	Immediate	P0	P1	P2	P3
	High	P1	P2	P3	P4
	Moderate	P2	P2	P3	P4
	Low	P3	P3	P4	P5

First 90 days: NU Production Support



Shared Support Inbox

1,960 emails received/responded to



IT Production Tickets

345 tickets submitted



Support Case Queue

440 Cases submitted/managed



Backlog List

570 items



Let's ascend WE'RE LIVE!

Ascend User Guides

Ascend FAQ

Bio-Demo Data...

Campaigns & Appeals

Event Management

Fundraiser / Portfolio...

Gift Processing

Planned Gift / Pomona...

Research, Relationship...

Stewardship

OnBase Integration...

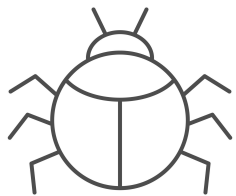
January 2025	February 2025	March 2025	Go-Live (3/31)	Post Go-Live
User Acceptance Testing (UAT)				
	Training Programs			
OnBase Document Management System				
Salesforce Marketing Cloud				

Bug & Enhancement Report

	A	B	C	D	E	F	G
21					Jaden Pinsak	W-001502	Highlight Card: Lack of Preferred Contact Information
22					Jennifer Dunn Greenspan	W-001488	Access to Event Attendee Tab Sections and Records
23					Nick Yi	W-001479	Eric Prosnitz: Employment Data Missing
24					Jaden Pinsak	W-001477	Preferred Name Updates Review
25					Courtney Derrico	W-001422	Ascend IDs missing for Planned Gift Proposal records



Pomona College - Post Go-Live Triage



Total Bugs

164 items



Total Enhancements

186 items



Resolved Bugs

117 items



Resolved Enhancements

84 items

CatNip: Cloning and Customizing List Views



CatConnect Users <CATRACKS-USERS@LISTSERV.IT.

To CATRACKS-USERS@LISTSERV.IT.NORTHWESTERN.EDU



Wed 6/25/2025 9:56 AM

Good morning CatConnect Users,
Welcome to your **CatConnect Tip of the Week!**

Today's CatNip: Cloning and Customizing List Views

Need a list view with specific filters or columns? Instead of building one from scratch, save time by cloning an existing list view that's similar to what you need. Cloning allows you to customize filters, sorting, and displayed fields—without changing the original view or affecting anyone else's experience. It's a quick, efficient way to tailor your data view to fit your workflow!

To Clone a List View:

1. Navigate to a list view that's similar to what you need.
2. Select the **gear icon**.
3. Select **Clone**.
4. In the pop-up:
 - Update the name of your list view (e.g., "My Op
 - Choose **Only I can see this list view**.

CatNip: Global Search vs. List Views



CatConnect Users <CATRACKS-USERS@LISTSERV.IT.NORTHWESTERN.EDU> on behalf of Mary L. Strupeck <mary.strupeck@northwestern.edu>

To CATRACKS-USERS@LISTSERV.IT.NORTHWESTERN.EDU



Wed 5/28/2025 3:32 PM

Hello CatConnect Users,

Welcome to your **CatConnect Tip of the Week!** Now that we've been in the system for almost four weeks, we'll be sharing these tips a little less frequently. As a reminder, system support questions can be sent using Cases in CatConnect. Your questions are helping us identify what information you need in CatNips or in other training materials.

Today's Tip: Global Search vs. List Views – What's the Difference?

Both **Global Search** and **List Views** are powerful tools in CatConnect, but they serve different purposes. Knowing when to use each can save you time and clicks.

Use Global Search When:

- You need to quickly jump to a specific record (e.g., a constituent's name, an object's record ID)
 - Global Search Pop-Up Results will display recent search results and suggested results (based on your previous interactions)
- You're trying to find a record but you don't know what object it lives in (e.g. a mailing list you've used before)
 - Peruse the full search results to refine by object type and/or object fields

Pro Tip: Use quotation marks for exact matches or wildcards (*) to expand your search. Learn about other wildcards and operators here: https://help.salesforce.com/s/articleView?id=ai_search_with_wildcards_operators.htm&type=5

Weekly status emails

 **Jeff Baynham** <jtbyaynha@ncsu.edu>
to bcc: group-lobousers@ncsu.edu

Mon, Mar 10, 3:10 PM ☆ ↶ ⋮

One month Live! We've made great progress over the last month. Below's highlights of new features and resolved issues is a testament to this. Thank you for continuing to bring issues and challenges. We are seeing them and working through them.

We have also extended Zoom support until April 3rd— links are available later in this email.

Cases

Submitted Cases	Active Cases	Completed Cases
348	194	154

*Excluding feature request cases

New Features & Resolved Issues

- **Stewardship Dashboard:** The Stewardship Dashboard can now be found in the Report Catalog section of your Lobo homepage. This dashboard allows for transactional stewardship by any college. The date processed range used ensures that no gift or new commitment is ever left behind! A release article can be seen [here](#).
- **Permanent/Perpetual Stewardship:** Constituents and organizations previously identified in Advance in permanent stewardship are now identifiable in Lobo. The field in Lobo is called "Stage of Readiness" and can be found on the overview page.
- **Stewardship Dates Reversed:** In the migration, the Auto-Renewal Date and Stewardship Close Date were reversed. Impacted portfolio opportunities were updated to correctly reflect renewal and close dates.
- **Qualification Due Dates Miscalculated:** In the migration, the Qualification Contact Report Due Date and Qualification Due Date were miscalculated for those in the Qualifying stage. Impacted portfolio opportunities were fixed with the proper calculated due dates.
- **SIS and HR data:** The automated daily feed of HR and Student data into Lobo is now up and running.

Prominent Outstanding Issues

Below are a few prominent outstanding issues and updates. Resolution dates are anticipated and could change. Check the [Lobo Known Issues](#) document for updates and an exhaustive list of issues. This document also highlights resolved issues.

 **Jeff Baynham** <jtbyaynha@ncsu.edu>
to bcc: group-lobousers@ncsu.edu

Mon, Feb 24, 3:58 PM ☆ ↶ ⋮

Two weeks live! We are making a lot of progress on cases. Thank you for submitting issues and suggestions— and thank you for your patience as we work through them. Our priorities right now include:

- Critical system issues where the system is not operating as designed
- Data migration issues (the longer we are live, the harder these are to resolve)
- Items that require Huron assistance (our post-live support ends 30 days from go-live.)

Cosmetic requests (changes to list views, screen layouts, etc.) and low-impact issues are being given lower priority. While we are in the stabilization phase of the project, we are not considering feature requests.

Activity stats since going live on February 10th:

Users Trained	Total Users Logged In	Issue/Defect Cases Submitted/Resolved
261	268	221/79
Gifts/Pledges Processed	New Opportunities Created	Contact Reports Entered
1,008	319	1,451

Resolved Issues & New Features

- **Default Opportunity Team:** We are introducing the ability for a fundraiser, by default, to add another staff person to all their opportunities. This is a useful tool if you have an admin/support person that you'd like to be able to edit your opportunities. Learn more about Default Opportunity Setting [here](#). Shout out to Tayler Lee for helping us test this feature!
- **OnBase documents:** Designation-based documents are now available in Lobo. Gift/pledge and constituent-based documents will be available in Lobo today for gifts completed before the blackout period.

Prominent Outstanding Issues

Below are a few prominent outstanding issues and updates. Resolution dates are anticipated and could change. Check the [Lobo Known Issues](#) document for updates and an exhaustive list of issues. This document also highlights resolved issues.



Sustain

Turning urgency into a sustainable operating model



Sustain

- Change management
 - Governance
 - Continued training
 - Transitioning to enhancement
- 
- 

NC STATE Advancement Portal

Home Learning Center Prospects Development Gift Resources Donor Services Communications R

Lobo Steering Committee

A subcommittee of the University Advancement Data and Technology Governance Committee (UADTGOV).

[SUBMIT A LOBO REQUEST FOR REVIEW](#)

Vision

To drive impactful, innovative, and sustainable solutions that empower the Lobo CRM to support the success of the entire Advancement community.

Mission Statement

Ensure strategic enhancements to the Lobo CRM by prioritizing solutions that align with NC State University Advancement goals, maximize user impact and leverage Salesforce capabilities. Through collaboration, stakeholder engagement and transparent decision-making, the committee delivers sustainable, user-focused outcomes that support University Advancement's mission.

Committee Guiding Principles

Advancement-Focused and User-Centered Decisions

Prioritize solutions that align with the strategic goals of NC State and serve the greatest good for the entire user community, as well as our alumni and donors. Committee members are expected to set aside individual unit needs or preferences in favor of the collective interest.

Salesforce-First and Sustainable Solutions

Leverage the full capabilities of the Salesforce ecosystem to implement efficient, scalable, and sustainable solutions. Focus on long-term adaptability while avoiding overly manual or inefficient approaches.

Stakeholder-Driven and Data-Informed

Engage with stakeholders to understand diverse perspectives and ensure decisions reflect user needs. Use data and feedback to guide priorities, focusing on measurable impact and objective analysis.

Efficient and Impactful Resource Use

Allocate time, budget, and personnel to projects that maximize the return on investment and create the greatest positive impact for the Advancement community.

Transparency and Continuous Improvement

Maintain open communication about decisions, priorities, and progress. Share updates and rationales with stakeholders while embracing flexibility and feedback to adapt and refine processes over time.

Evaluation Methodology

When evaluating a proposed project, the Lobo Steering Committee will, keeping the guiding principles in mind, individually score the proposal based on the impact (who will it benefit), efficiencies gained, and strategic alignment. Independently, Advancement Information and Technology will score the proposal's technical complexity and resources needed.

The individual scores will be combined to create an average score for each proposed project as an initial prioritization for discussion by the Committee. The Committee will discuss the priority of the proposal as it relates to the existing prioritized projects. This will become the prioritization for development. A project's priority may rise or fall depending on deadlines and the priority of other evaluated projects.

Committee Members

Name	Unit	SME Area
Jeff Baynham (Executive Sponsor)	Advancement Services	Overall advancement

Lobo Update – 8.15.25 – 6 Months Live!

By Advancement

This week marks six months of Lobo, and we're celebrating by rolling out some exciting new features! Your feedback has been instrumental in driving our development and fixes, and we're grateful for your partnership. This update highlights key updates, including a new guided tour for your portfolio and enhanced dashboards. We're also giving you a sneak peek at what's next, like a new engagement score and paginated reporting.

RECENT RELEASES

- **Portfolio Guided Tour Release.** Series of bug fixes and solution enhancements designed to simplify and streamline your interactions with a portfolio opportunity. Release will "guide" the user through the next steps of an opportunity based upon its current progress using "action buttons" to select the path and prompts to add any specific information necessary to advance the opportunity. Learning resources for this release can be reviewed and accessed [here](#), and in the [Lobo Learning Guide](#). *DELAYED DEPLOYMENT: watch portal for updates.*
- **Donor Counts for Last 5 FY's Dashboard.** The [Donor Counts for Last 5 FY's \(by College, Subunit, and Program\)](#) dashboard is now available in the Report Catalog section of your Lobo homepage under the Giving Reports folder. This solution should help anyone looking for donor counts in the last 5 FY's, with counts provided by college, subunit, and/or program.
- **Designation Donors and Dollars Dashboard.** The [Designation Donors and Dollars](#) dashboard is now available in the Report Catalog section of your Lobo homepage under the Giving Reports folder. This report allows the user to see gifts donors and dollars to any designation or group of designations for any FY.
- **Split Event Ticket Release.** Series of solution enhancement specifically tailored to support event sponsorships and registrations with a charitable component tickets. Releases included changes to automations, added calculations to determine the income and charitable amounts on paid events, and enhancements to the financial feed to accommodate new features. In addition, introduced a new "event number" to uniquely identify an event in a more user-friendly way.
- **Annual Giving Target Ask Amounts.** Solution calculates an ask amount customized to the constituent's giving history. This is used in annual solicitations throughout the fiscal year to encourage upgrades, renewals, and to acquire new donors.
- **Case Priority Enhancement.** New Lobo support cases will provide a means to set the initial priority based upon its impact and urgency for a resolution. Priority will aid in the focusing resources to address the case.
- **Preferred Biographic Indicators.** Identifies constituents with active addresses, telephones, or emails but missing a preferred indicator flag. Automation evaluates the available records and sets a preferred indicator where a decision can be determined. This decreases data gaps in the list reports.

IN DEVELOPMENT

- **Engagement Score.** NC State's new engagement score will go live August 21st. Join the Lobo Learning Lab on August 20th.
- **People Finder.** An interactive dashboard allowing user to apply filters to build a population; similar to Targeter.
- **Paginated Reporting.** A new reporting solution will allow for paginated (print-friendly) reports. An Event Bullet Report is currently in development.
- **Automated Recent Donor Screening.** Automated process to evaluate recent donors and screen them through DonorSearch.
- **Acoustic Event Integration.** Refine the feed between Lobo and Acoustic specific to events to allow individuals invited to an event through Blackthorn to be emailed even if they do not have a constituent.
- **Evertrue Integration.** Reintegration with Evertrue platform to bring LinkedIn employment data and Facebook engagement data into Lobo.
- **Salutations v2.0** Refinement to our salutation generation process to eliminate bugs.
- **Disaster Area Impact Solution.** Solution to easily allow select populations to be excluded for solicitations and events when they've been impacted by a disaster. A banner within Lobo on the constituent will inform users the constituent is impacted.

This is a summary of projects of most interest to end users and not a complete list of work items in development.

LOBO STEERING COMMITTEE

The [Lobo Steering Committee](#) (LSC), made up of members representing all areas and functions of Advancement, helps decide which improvements to make to NC State's Lobo CRM. It focuses on projects that support Advancement goals and benefit the most users. Proposals are scored on impact, efficiency, and alignment, along with technical needs, to set priorities. The goal is to deliver practical, sustainable solutions that serve the whole Advancement community. You can learn more [here](#).

SUBMIT A PROJECT TO LSC

LOBO LOGIC

This section is dedicated to addressing recurring questions and topics, and is intended help ensure that everyone has access to clear, consistent answers about the ongoing changes, upgrades, and limitations of Lobo.

You can also find these questions and answers in the [FAQs section of the Lobo Learning Guide](#) for easy reference.

Q1: A team member needs an update to their access in Lobo. What should I do?

A1. You can have the team member's supervisor fill out the [Lobo Onboarding Form](#). This provides the Advancement Learning training team with everything they need to ensure your team member's access is updated, a case is submitted to Lobo, and the appropriate training is administered.

Q2: I want support staff to be able to update my opportunities. What should I do?

A2. You can designate a specific person as an admin or primary contact for all opportunities. This allows you as a Primary Relationship Manager to maintain your central point of accountability while allowing your broader support staff to contribute. This structure ensures that updates don't fall through the cracks. Directions on how to assign an admin contact can be found [here](#).

TRAINING RESOURCES

UPCOMING TRAINING

Lobo Learning Lab – The New Engagement Score

Wednesday, August 20 – 1-2 p.m. | [Zoom link](#)

Join us for a Lobo Learning Lab to explore NC State's new Engagement Score, a metric designed to provide a holistic view of constituent involvement with the university. Unique to NC State, this score measures four key areas of engagement: philanthropy, volunteering, experiential participation, and communication. During this session, we'll walk through the purpose of the score, how it is calculated, and how it can be leveraged to inform strategy, deepen relationships, and support fundraising and engagement goals. We'll also save time at the end of the session to take a look at the engagement dashboard for those who have access.

NEW RESOURCES

Lobo Lite Videos: Short, focused walkthroughs highlighting the specific updates to the opportunity stage flows.

1. [Moving a MG from Qualify to Cultivation & Open](#)
2. [Moving a MG from Cultivating & Open to Negotiate & Close](#)
3. [Referring a MG Qualification Opportunity](#)
4. [Disqualifying a MG Qualification Opportunity](#)

Step-by-Step Guides: Digital guides that provide clear instructions for completing each stage's tasks.

5. [Moving a Major Gift Opportunity from Qualify to Cultivating & Open](#)
6. [Moving a MG from Cultivating & Open to Negotiate & Close](#)
7. [How to Disqualify a MG Qualification Opportunity](#)
8. [How to Refer a MG Opportunity to LG](#)

Updated New Hire Training: All changes have been integrated into the new hire curriculum in the [Advancement Academy LMS](#).

NC State Cases Overall



	Total	Completed	Open
Total Cases	1,011	657	354
Defect/Issue	795	585	210
Enhancement (Backlog)	216	72	144
Production Items	#	#	#



Reflect

What hindsight teaches about thriving post-go-live



Download Resources

<https://go.ncsu.edu/crmstabilize>



Thank
you.