# Innovation is Business-Critical for WPI Advancement Team

*Worcester Polytechnic Institute is a technological university dedicated to the technical arts and applied sciences, located in Worcester, Massachusetts, with approximately 6,000 undergraduate, graduate and doctoral students.*

*"Collaboration isn't just nice, it's necessary."*

■ Cheryl Ann Cerny, Senior Director of Advancement Information Management & Research

## CHALLENGE

The Division of University Advancement at Worcester Polytechnic Institute was facing challenges with their legacy advancement database. Communication within the team was a "huge issue," as Cheryl Ann Cerny, Senior Director of Advancement Information Management & Research at WPI, described in her presentation at Dreamforce 2014. Information needed to be more accessible.

According to Cerny, "We needed to make sure that we had an environment for our fundraisers to quickly communicate with each other so that we could keep everything moving at a fast pace and not lose any opportunity." They needed a system that would enable them to work smarter and collaborate in order to successfully vie for limited fundraising dollars in New England's competitive higher-education rich environment. Innovation was business-critical for the WPI advancement team.

## SOLUTION

After considerable research and requirements gathering by Cerny and others, WPI selected Salesforce.com as its enterprise-wide CRM and ACF Solutions as its implementation partner. The advancement team would be the first division on campus to move to Salesforce and was joined by the Academic and Corporate Development Division. Over the course of a 12 week project, ACF implemented Salesforce to support donor, prospect, and proposal management for WPI's gift officers, and trained the team to use the new system. ACF also helped WPI extend Salesforce to meet several of WPI's key challenges around effective data sharing and governance, without compromising native software. By taking this approach, ACF was able to build a solution customized to WPI's specific business needs that could still be easily upgraded and maintained by the University. Some components of this solution included:

- Implemented and configured Salesforce's Advancement Connect product to provide Advancement specific functionality.

- Configured a custom sharing solution that allowed for complex opportunity ownership, greater transparency with fundraising goals and metrics and automated communication rules across current staff, former staff, and faculty.

- Automated key processes throughout the major donor life cycle to increase collaboration and reduce staff processing time.

- Extended the native Salesforce security model to allow for granular access to confidential information across the team.

## RESULTS

Only 3 months post-implementation, the WPI advancement team reports greater staff efficiency, collaboration and visibility into their opportunities, with all of the relevant and necessary data pulled into one record through native Salesforce tools and customized objects. This initial implementation also set the foundation for implementing CRM institution-wide. WPI and ACF are presently working on Phase Two of the implementation.

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### About ACF Solutions, An Attain Company

Located in Reston, Va., ACF Solutions, An Attain Company (ACF) is a wholly-owned subsidiary of Attain, LLC, a management, technology and strategy consulting firm. ACF specializes in large-scale, complex implementations of Salesforce solutions for the Higher Education and Nonprofit sectors.

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Proven Performance. Forward Thinking.

### About Attain

Based in McLean, Va., Attain is a leading management, technology and strategy consulting firm comprised of innovative problem solvers who deliver tangible results to address today's complex challenges. Attain's transformative business and IT solutions and services deliver market-leading results to our customers in the government, healthcare, education, and non-profit sectors.

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