



CASE STUDY

Modernizing Advancement for the Analytics Era

Building an Enterprise Data Foundation to Accelerate Growth

MANAGING MORE THAN 350,000 CONSTITUENTS and upwards of three million giving records, a large private university recognized that analytics could no longer live outside the system of record. Reporting, segmentation, and executive visibility had to be embedded directly into their CRM architecture. This was not simply an implementation—it was a comprehensive redesign of how advancement data should work at enterprise scale. **Attain Partners answered the call to help bring this initiative to life.**

Rather than recreating legacy reporting structures, the institution embedded analytics into the implementation from day one. Leveraging functional sprints aligned business processes with reporting dependencies, we ensured that KPI definitions, dashboards, and workflows reflected strategic priorities rather than historical artifacts.

Through collaborative design sessions, we convened advancement leaders and architects to define which dashboards truly mattered. Balancing executive visibility, operational usability, and long-term sustainability resulted in a streamlined reporting model built natively within the CRM environment.

This transformation required re-architecting more than 40 integrations across financial systems, event platforms, student systems, and analytics environments. We ran iterative mock migrations to **ensure data accuracy and institutional trust at every stage.**

As part of this initiative, the university is working towards a unified advancement platform engineered for analytics maturity: positioned for predictive modeling, AI-assisted prospect scoring, and future Data Cloud initiatives—**without needing to rebuild its foundation again.**

~3 MILLION
GIVING RECORDS
migrated and standardized

350,000+
CONSTITUENT RECORDS
optimized for real-time reporting

40+
SYSTEM INTEGRATIONS
re-architected enterprise-wide

24 MONTH
ENTERPRISE TRANSFORMATION
driven by AGILE Methodology

700+
LEGACY REPORTS
*reimagined, redesigned,
consolidated, and replaced*



Learn more about how Attain Partners has helped drive this ongoing transformation

bit.ly/4rMD877