

# Vanderbilt Launches a Transformational Fundraising and Alumni Platform

Founded in 1873 with a \$1 million gift, Vanderbilt was built on a mission to “contribute to strengthening the ties that should exist between all sections of our common country.” In support of this founding vision, today’s leaders saw an opportunity to transform the university’s development and alumni relations (DAR). By replacing Vanderbilt’s legacy advancement technology system with an integrated Salesforce platform, they sought to strengthen connections among constituents, alumni and the university’s network of philanthropic support. They collaborated with Huron to ensure that their bold vision was achievable within an aggressive timeline — proving that digital transformation in higher education can happen swiftly.

## Looking Forward

Vanderbilt is an independent, privately supported institution that continuously innovates to advance its mission. When a new chancellor took office and a new vice chancellor took over leadership of the university’s development and alumni relations

(DAR), they recognized an opportunity to transform Vanderbilt’s advancement capabilities. Rather than relying on disparate, decades-old systems to produce a complicated historical view of donors’ giving, they wanted to innovate and plan for the future — using modern tools to better understand their constituents’ preferences, concerns and interests, and engage them in new ways.

“We realized we needed to start looking forward, not backward. It’s not what a five-year donor history tells us about the past, but what it could tell us about the future.”

**JILL BALTZ, ASSISTANT VICE CHANCELLOR  
ADVANCEMENT SERVICES**

Vanderbilt’s vision for a modern approach to fundraising and advancement hinged on an accelerated timeline. Before launching a public fundraising campaign, leaders sought to replace their existing technology ecosystem with an integrated Salesforce platform and transform development and alumni relations operations. The onset of the COVID-19 pandemic further heightened the need for innovation, agile strategies and enhanced fundraising capabilities.

# Accelerating Transformation

Vanderbilt leaders worked with Huron to select a customer relationship management (CRM) system — Salesforce — that would serve as the backbone for their advancement platform. Together, they created a road map to transform the university's systems and operations on an accelerated, 22-month timeline. Many key factors contributed to their successful approach:

## Quick, Visible Wins

To implement wide-scale changes swiftly and strategically, it was important for Vanderbilt to build momentum. Its comprehensive CRM launch road map intentionally included quick, visible wins. Among them was the early launch of Salesforce Marketing Cloud, which was rolled out while teams were laying more extensive plans to evolve the Salesforce platform and the alumni portal environment.

While this feature is still in its infancy, Salesforce Marketing Cloud promises to transform Vanderbilt's enterprise communications, allowing teams to segment and personalize their outreach based on DAR-related analytics, insights and modeling. It will also allow development officers to leverage new wealth screening and capacity data to enhance portfolios and focus on reaching those with the highest campaign potential.

## Understanding Constituents

Vanderbilt implemented Salesforce with Affinaquest as the foundation of its advancement platform to allow staff to create more personalized, meaningful interactions with prospects. By integrating key data points to provide a 360-degree view of the constituent, advancement staff can see donors' various communication points, their giving history, and their internal and external relationships to Vanderbilt — important insights that impact their outreach and communication plan.

Understanding donors' giving motivation and decisions will also inform Vanderbilt's campaign strategies in the future. With a clearer picture of donors' interests, Vanderbilt can align institutional fundraising priorities with the causes that are most important to constituents.

## Results

### Clarity and Efficiency

- 360-degree view of constituents' history, preferences, interests, trends, behavior
- Robust campaign and donor modeling, reporting and analytics
- Amplified, targeted messaging designed to maximize giving potential
- Streamlined business processes
- Collaboration across advancement and alumni relations teams
- Enhanced compliance and data integrity

### Accelerated Fundraising

- Donors interface with targeted, cause-based giving portal
- Campaigns are segmented and personalized
- Prospecting reflects constituents' interests, profession and preferences
- Wealth screenings can be readily conducted

### Platform for Continuous Improvement

- CRM platform supports ongoing innovation
- DAR staffing is aligned to support growth
- Constituent expectations shape DAR business processes and outreach efforts
- Continued acceleration of strategic communication and campaign analytics is on track

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“To be able to look up information about people in real time and have notes while you’re on the road, instead of trying to print every possible report and stash it in your backpack before you go, will be a big help.”

**JASON REUSCH, SENIOR DIRECTOR, VANDERBILT UNIVERSITY INFORMATION TECHNOLOGY (VUIT)**

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Vanderbilt’s new platform also supports mobile functionality that will allow relationship managers and DAR staff to better optimize their workflows, track their engagement with donors and alumni more easily throughout their day, and increase transparency between development and alumni relations teams.

With greater alignment, shared data, streamlined processes, and seamless visibility and collaboration, DAR will continue to innovate and optimize processes as they navigate the pandemic and future campaigns. As Jason Reusch, VUIT senior director, noted, “This project will continue to drive a tight collaboration across our teams.”

### Unleashing Innovation

Looking ahead on Vanderbilt’s strategic road map, the university also plans to integrate Tableau CRM (formerly known as Einstein Analytics Pro) with the Salesforce platform — and in doing so, lay the foundation for ongoing innovation. With robust cloud-based analytics, scoring models and reporting capabilities, staff can develop more insightful year-over-year analyses and more strategic prospect identification plans. Key drivers of DAR’s ongoing transformation include:

- Integrated, interactive dashboards that illuminate individual and program

progress, constituent insights, and the effectiveness of campaigns and appeals.

- Trusted reports to show varying levels of detail, allowing DAR leaders to assess and pivot quickly to ensure the campaign continues to meet its goals in the aftermath of an unprecedented pandemic.

### Creating Community

Vanderbilt’s platform design includes the rollout of a new portal, specifically developed to engage its alumni community of 147,000 living constituents across 42 global chapters. While not yet implemented, Vanderbilt plans to provide constituents with a one-stop shop to engage alumni online, allowing visitors and alumni to learn more about fundraising efforts, make gifts and see the impact of their giving.

Vanderbilt’s platform will also include a robust self-service functionality that allows donors to engage and see the evolution of their giving. Within their personalized online giving platform, constituents can review their giving history, view impact reports, organize event registrations and access alumni member resources, including benefits for donors who give at certain levels. Donors also enjoy a state-of-the-art shopping cart experience on par with those found in the online retail industry.

A key feature in Vanderbilt’s portal design is a cause-based tool that helps alumni and donors find ways to give that align with their broader personal and professional interests. This allows alumni to see the meaningful giving impact unrestricted funds can have on the university— a top campaign priority for Vanderbilt.

### Ongoing Transformation

Vanderbilt’s transformation will continue to unlock insights and advance the university’s legacy of innovation. As the Salesforce ecosystem evolves, so will the strategies and plans Vanderbilt sets in motion to continue to optimize its platform and

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enhance the donor experience. In collaboration with Huron, Vanderbilt plans to build on the foundation the university has implemented and heighten the impact of its advancement office. The investment in creating a modern, integrated experience for DAR staff and donors will allow the institution to remain agile and responsive to emerging trends as giving opportunities and alumni relationships in higher education continue to evolve.

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Vanderbilt University is a private, academically selective, independent institution that is globally renowned for its transformative education and research. It hosts a prominent alumni base spanning 147,000 living constituents across 42 chapters worldwide. Among them are Nobel Prize winners, members of Congress, governors, ambassadors, judges, admirals, CEOs, university presidents, physicians, attorneys and professional sports figures.



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