



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

Effective Change Management and CRM Transformation

NAVIGATING TRANSITIONS

EXPLORE
PD25
New Depths

The logo for 'EXPLORE PD25 New Depths'. 'EXPLORE' is in a large, bold, orange, serif font. 'PD25' is in a smaller, white, sans-serif font. 'New Depths' is in a large, orange, cursive script font. A decorative, swirling line in a light teal color is positioned between 'PD25' and 'New Depths'.



BEREA COLLEGE

CANDIS ARTHUR
AVP FOR PHILANTHROPIC OPERATIONS

WILL REYNOLDS
DIRECTOR OF DATA DEVELOPMENT

KELLY EMBRY
DIRECTOR OF PROSPECT MANAGEMENT AND
DATA SERVICES

ABOUT BEREA COLLEGE

Founded in **1855** in Berea, Kentucky

First interracial and coeducational college in the South

Offers **tuition-free education** to every student



Serves students primarily from **Appalachia and beyond** with high academic potential and limited financial resources


Emphasizes **labor, learning, and service**—students work at least 10 hours a week in campus jobs





POLL #1













 APRA Conference ... 

How prepared do you feel for the upcoming CRM transition or change project? 0 

 - Not at all prepared  - Very prepared

Give your rating





How prepared do you feel for the upcoming CRM transition or change project?

Effective Change Management and CRM Transformation



CHANGE MANAGEMENT TIP: STRATEGIC PRIORITIZATION AND PLANNING

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STRATEGIC PRIORITIZATION AND PLANNING

Engage key stakeholders and prioritize must-have reports and dashboards for launch

Name	Priority Code	Description	Frequency	Input Parameters	Output Summary	CRM Advance Destination	Staff Member working on	Elucian Comments	Comments
Legacy Wall - Bequests	High	Provides a list of all donors who were coded in that fy.	biannually	Beginning and Ending Gift Date		Advanced Find View	Sue	Prompted by date range, generates list of all people who made a bequest gift in that time. If begun on the Contribution Donor record, can include person and contribution attributes needed	Gena has to manually remove duplicates and perp trusts. She also pays attention to first gift date in output, to make sure that the donor is not duplicated on the wall.
New Donor Emails 06.07.22	High	Selects prospect info based on ID, ST, County, and Gift Officer selection. Excludes deceased, and exclusions of CON, REM, and RET.				Comm Plans	Will		Advancement.Ad Hoc.Rachael Isaacs.Berea Fund.Phonathon Emails 06.07.22
Gift Processing-EFTs,Recurring CC and Payroll Ded - Friends and Alum EFT and RC	High	Pulls lists of EFT and AR to enable mail merge for monthly giver receipts in January	Yearly	Date	Donor info, contact info, trustee, salutation	Standard Report	Dustin	Can be built for all the relevant types of contributions, and then grouped by donor and include the annual total.	
Homecoming and Summer Reunion Ribbons	High	gift club ribbons for name tags	ad hoc	ask Will	info,Donor Cats, Alum Council, GCS, All ribbon names for all societies	SSRS			
SJJ-RNT BT Match query data w BTUPLD with non-constituents 5.9.22	Medium	Selects hard credit gifts with date and PIDM prompts. Used for month end student giving. Use RNT Student PIDMS by Month and Year prompts 2.20.17 to get PIDMS.				Part of BT Process	Sue, Heather		ral.SJJ-RNT BT Match query data w BTUPLD with non-constituents 5.9.22
Legacy Wall Report	Medium	PLW				Advanced Find	Rachael		Advancement.Ad Hoc.Rachael Isaacs.Planned Giving.Legacy Wall Report
GCS LIST ALL MEMBERS	Medium	Running this report provides a list of all GCS members	as needed	No prompts		Advanced Find	Sue		
AEC-Current and Former	Medium	Selecting Alumni Executive Council members	ad hoc		address info and years on council	Advanced Find	Candis		

STRATEGIC PRIORITIZATION AND PLANNING

Assign team members to specific functional areas

Work Groups									Component Teams		
Alumni	Gift Processing	Finance	Prospect Management	Philanthropy Officer	Planned Philanthropy	Comm	Reports/ Dashboards (Report and Integration)	Donor Experiences Student HR	Technical Team	Security	User Experience (consistent data and training)
Sue	Candis	Dorothy	Molly	Molly	Sue	Will	Will	Sue	Heather	Heather	Sue
Jackie or Kristin	Heather	Heather	Brittney	Mary G.	Amy	Candis	Hamza	Mindy	Will	Dorothy	Molly
Dorothy	Brent	Connie	Sue	Will	Gena	Hamza	Sneha	Candis	Albert	Will	Candis
Julianna	Mindy				Molly	Jo	Candis	Theresa L.		Sue	
								Crystal Erwin		Molly	
								Judy or Kathy			

STRATEGIC PRIORITIZATION AND PLANNING

Design small but meaningful improvements rather than duplicating legacy processes

GeneralProposalsAssignmentsFinancial InformationName HistoryConstituentsFinancial AwardsRestrictionsCommentsRelated DataRelated

Student Restrictions

Direct Aid or Tuition	Tuition
No Preference	---
Gender	---
Number of Students	---
County or City	Buchanan County, VA, Harlan County, KY, or other coal mining counties of VA, WV, and KY
First State Preference	Kentucky
Second State Preference	Virginia
Third State Preference	West Virginia
Final State Preference	---
Region	Counties listed or coal mining counties.
Class Year	---
Domestic or International	---
Need Based	No
Percent Awarded	---

Student Restrictions

Major	---
Academic Requirement	Borderline students, i.e., those who are not in the forefront of their class academically, but who have a desire to succeed
Labor or Extracurricular	---
Other Criteria	---

Scholarship Awarded by Financial AidYes

ENDOWMENT VALUATIONS

✓	Fiscal Year	Valuation D...	Distributed Inco...	Market Value	Book Value	Shares
	2025	12/31/2024	\$4,630.91	\$100,587.78	\$85,489.94	
	2024	12/31/2023	\$4,120.60	\$84,577.71	\$75,489.94	

STRATEGIC PRIORITIZATION AND PLANNING

Key Takeaway

Don't aim for perfection out of the gate—aim for stability, usability, and scalability. Let your roadmap evolve as your users engage with the new system.



Effective Change Management and CRM Transformation

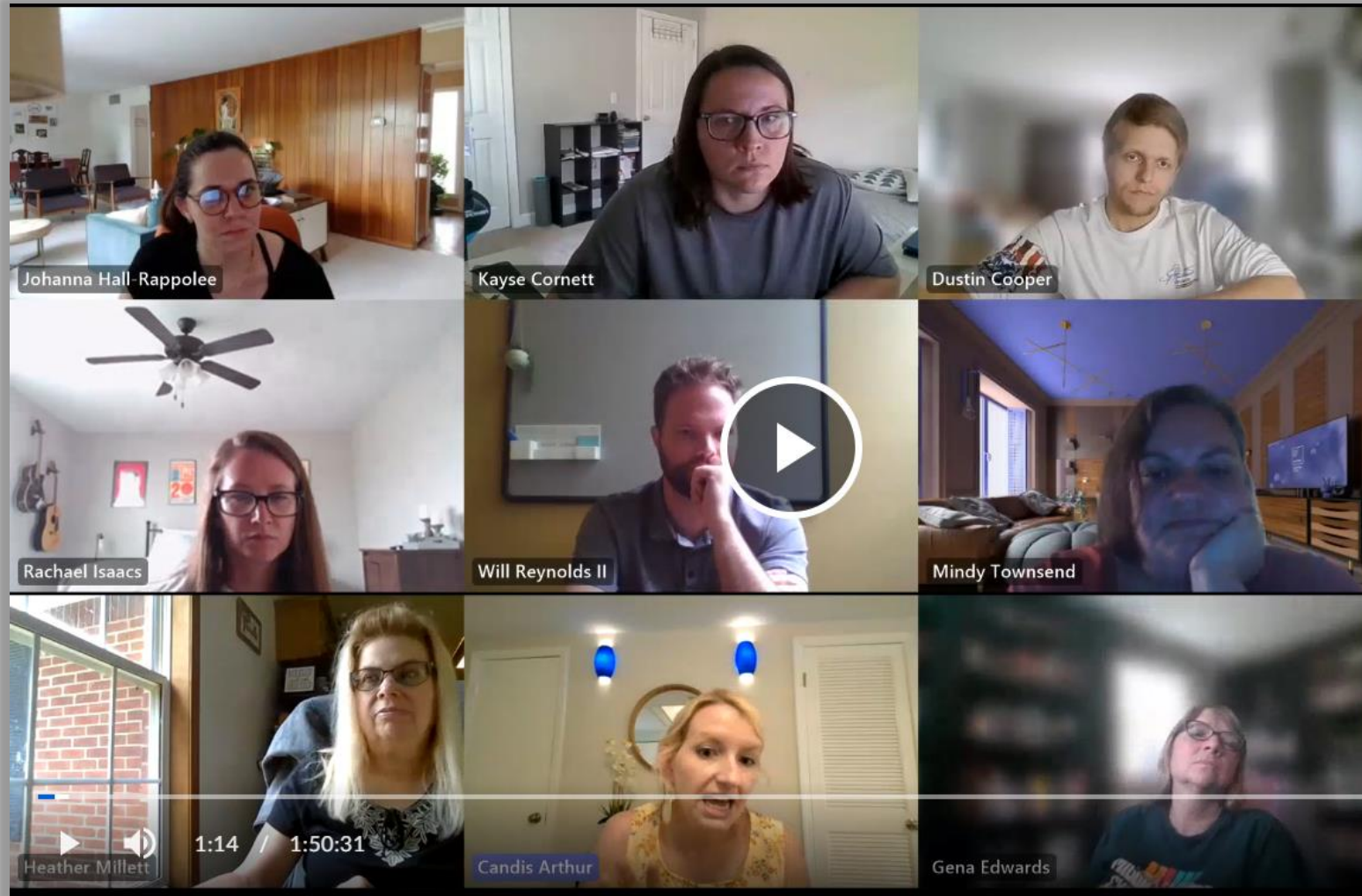


CHANGE MANAGEMENT TIP

CROSS-DEPARTMENT COLLABORATION

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CROSS-DEPARTMENT COLLABORATION



Ensure teams are part of the **testing process**, not just informed after the fact

CROSS-DEPARTMENT COLLABORATION

Be Inclusive

- demonstrate **benefits**,
- **build trust**,
- be **enthusiastic**
(it's contagious)!



CROSS-DEPARTMENT COLLABORATION

Key Takeaway



Change is easier to manage when people feel like they're part of it.

- **Invite collaboration** early and often.
- **Build champions** across your organization.



POLL #2



APRA Conference 2025

What is your preferred method for training?

0 





What is your preferred method for training?

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CHANGE MANAGEMENT TIP TRAINING AND SUPPORT INFRASTRUCTURE

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TRAINING AND SUPPORT INFRASTRUCTURE

Provide Diverse Training Materials

🏠 > CRM Transition > Trainings and Transition Meetings > Train

NAME ↑	UPDATE
 Ellucian Classic View Training Materials (We use UI version)	Oct 17,
 Power User Validation Training	Oct 12,
 Training Videos	 Jan 25,
 Activity Import External Email.csv V3	 Jan 17,
 Activity Import Letter.csv V2	 Jan 17,
 Alumni Roll CRM Notes 6.3.24.docx	 Jun 3, :
 CRM Advance Activities.docx V2	 Dec 7, :
 CRM Advance Activity Entry 2.18.2025 sjj.docx	 Feb 18,

CRM Tips ▾

CRM Tips ▾				🔍	Help	📄	Privat
✓	Subject ▾	Description ▾	Due D...	↓	▾		
	CRM Tip of the Week: viewing Alerts	From: Sue Johns <johnss@berea.edu> Sent: Friday, April 11, 2025 10:47 ...	4/11/2025...				
	CRM Tip of the Week: Contact Preferences	From: Rachael Isaacs <isaacsr@berea.edu> Sent: Friday, April 4, 2025 7:...	4/4/2025 ...				
	CRM Tip of the Week/ Searching Alternate Names	From: Rachael Isaacs <isaacsr@berea.edu> Sent: Friday, March 28, 2025...	3/28/2025...				
	CRM Tip of the Week: looking at Involvements	From: Sue Johns <johnss@berea.edu> Sent: Friday, March 14, 2025 1:31...	3/14/2025...				
	CRM Tip of the Week: looking at memorial/tribute gift	From: Sue Johns <johnss@berea.edu> Sent: Friday, March 7, 2025 1:52 ...	3/7/2025 ...				
	CRM Tip of the Week: Looking at Contact Preferences	From: Sue Johns <johnss@berea.edu> Sent: Friday, February 28, 2025 9:...	2/28/2025...				
	CRM Tip: Locating and Viewing Designations	CRM tip walks you through viewing designations and their details. This i...	2/4/2025 ...				
	CRM Tip of the week: Locating records with short ID numbers	Good morning, all. It can be frustrating trying to locate the record of a p...	1/17/2025...				
	CRM Tip of the Week - Timeline Activities	Hello everyone and happy Friday! There are multiple ways and places to...	1/10/2025...				
	CRM Tip of the Week	Good morning CRM Users, Happy Friday! It's time for another CRM Tip ...	12/13/202...				
	CRM Tip of the Week (terminology)	It's Friday and time for another CRM tip of the week! This week we are s...	12/6/2024...				



TRAINING AND SUPPORT INFRASTRUCTURE

Team and Individual Training: Organize both group workshops and one-on-one sessions to address specific departmental or individual needs.

 > [Trainings and Transition Meetings](#) > [Training Documents for Users](#) >

NAME ↑



ACP CRM Training Engagement Activity 01.24.2024.mp4



CRM Advance Training Advanced Finds, View, Dashboards 10.17.23.mp4



CRM Advance Training Bio Dem Maintenance 10.10.23.mp4

1



CRM Advance Training Comm Plans 10.16.23.mp4



CRM Advance Training Contribution Entry and Adjustments Part I.mp4



CRM Advance Training Contribution Entry and Adjustments Part II.mp4



CRM Advance Training Contribution Maintenance Day One.mp4



CRM Advance Training Contribution Maintenance Day Two.mp4



CRM Advance Training Designations, Gift Societies, Events 10.16.23.mp4

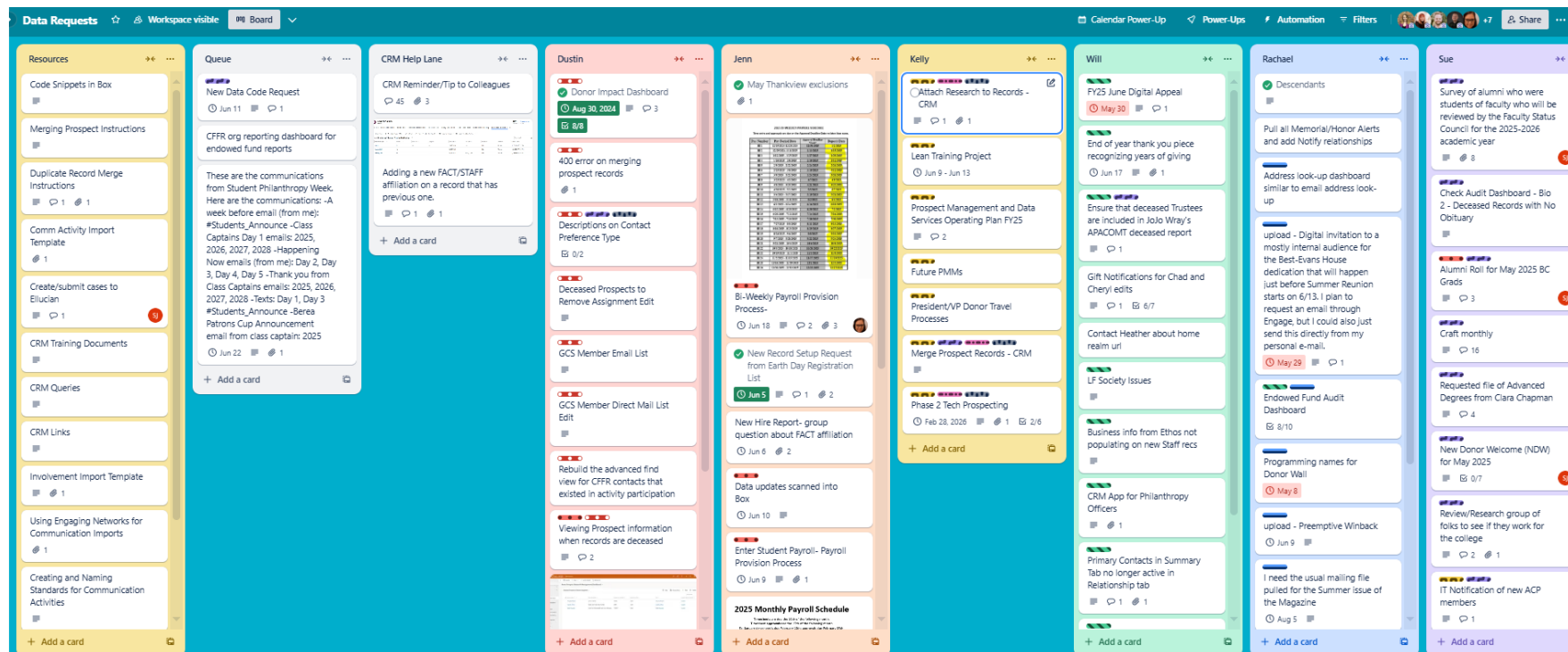


CRM Advance Training Finance Office 10.19.23.mp4



TRAINING AND SUPPORT INFRASTRUCTURE

Accessible Support Channels: Implement dedicated support lanes (like a CRM help lane, chat channels, or ticket systems) to quickly resolve issues as they arise.



TRAINING AND SUPPORT INFRASTRUCTURE

Key Takeaway

Invest in a comprehensive training and support plan that meets your team where they are. This not only enhances their confidence in using the new system but also drives smoother adoption and ongoing system improvement.

Effective Change Management and CRM Transformation



CHANGE MANAGEMENT TIP

DATA INTEGRITY AND TESTING

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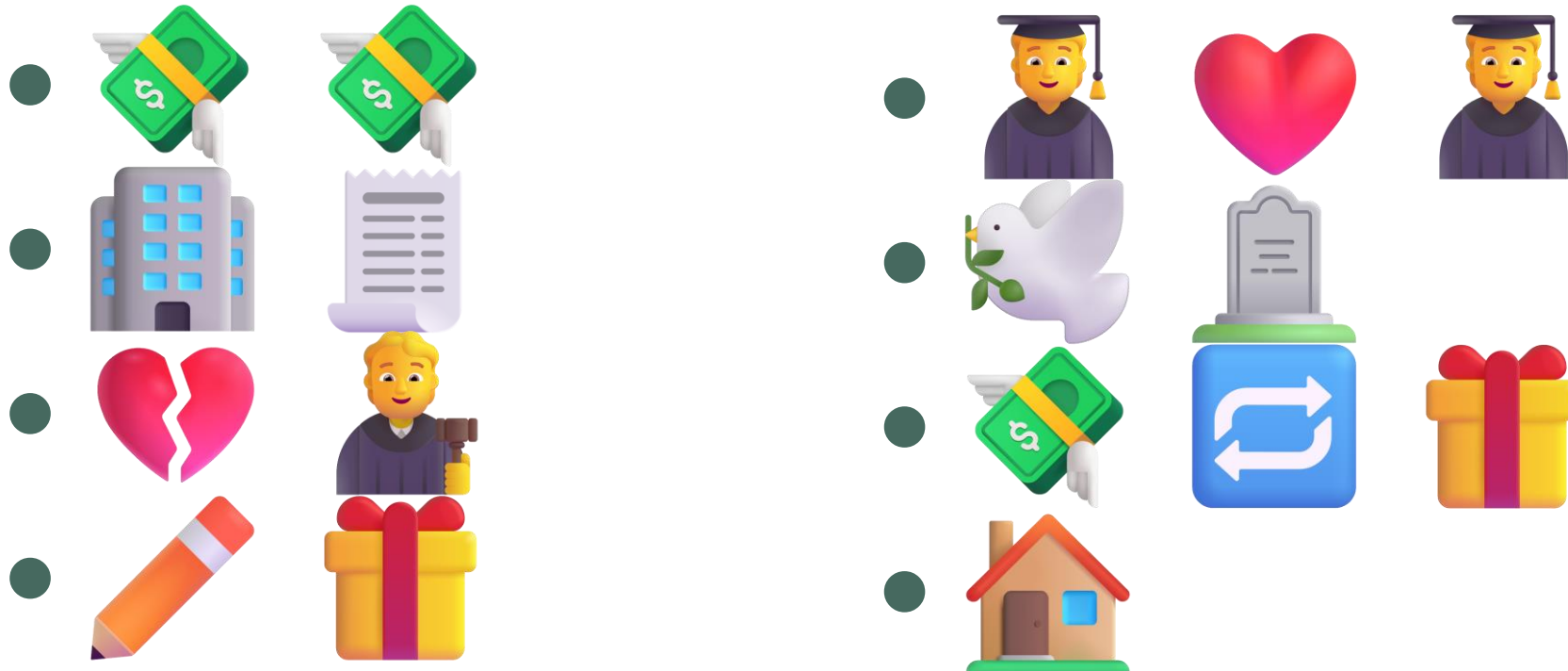
DATA INTEGRITY AND TESTING

Audit Dashboards:
Implement dashboards
specifically designed to
catch data errors and
discrepancies.



DATA INTEGRITY AND TESTING

Create Diverse Testing Scenarios: Use various records to create real-world scenarios and compare legacy system views.



DATA INTEGRITY AND TESTING

Controlled Merging of Data: Carefully merge prospect data to prevent duplication and maintain clean records.



●	DUPLICATE Catherine Abbott - 287236 - ---- ----
●	Mr. DUPLICATE Charles Abbott - 287237 - ---- ----
●	Mr. DUPLICATE Allen - 283674 - Alumnus/Alumna 1986
●	DUPLICATE Harry Barnes - 274231 - Friend ----
●	Mr. DUPLICATE T. Bertrom - 267464 - Friend ----



DATA INTEGRITY AND TESTING

Ongoing Quality Checks: Check-in with others using the system and make adjustments/improvements when needed.

DATA INTEGRITY AND TESTING

New Contact Preference

Contact Preference

INFORMATION

Person

William D. Reynolds

Populate Contact Preference

Contact Preference *

Planned Philanthropy Communication

Planned Philanthropy Information

--Select--

Contact Preference *

--Select--

Status Change Date

Info on Benefit IRA/Retirement Plan

Method of Contact *

Info on BIW

Contact Restriction *

Info on CGA

Source

Info on CRUT

College

Info on Deferred Payment CGA

Department

Info on GCS

Comments

Info on Gifts Life Insurance

Info on Gifts of Real Estate

Info on IRA Rollover

One Mailing per Year

CON

Us

Cc

Nc

Ac

Nc

Ac

Nc

New Contact Preference

Contact Preference

INFORMATION

Person

William D. Reynolds

Populate Contact Preference

Contact Preference *

Donor Listing

Donor Listing Type

--Select--

Contact Preference *

--Select--

Status Change Date

Gift Club List

Method of Contact *

Impact Report

Contact Restriction *

Online List

Source

Recognition Wall

CON

Us

Cc

Nc

Ac

Nc

Ac

Nc



DATA INTEGRITY AND TESTING

Key Takeaway

Prioritize data integrity through systematic testing to build a reliable CRM system that supports confident decision-making and operational excellence.

Effective Change Management and CRM Transformation



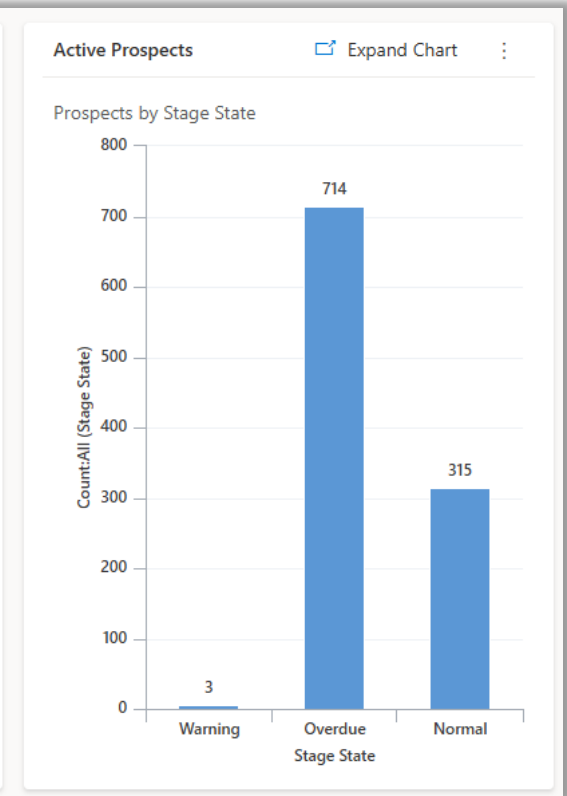
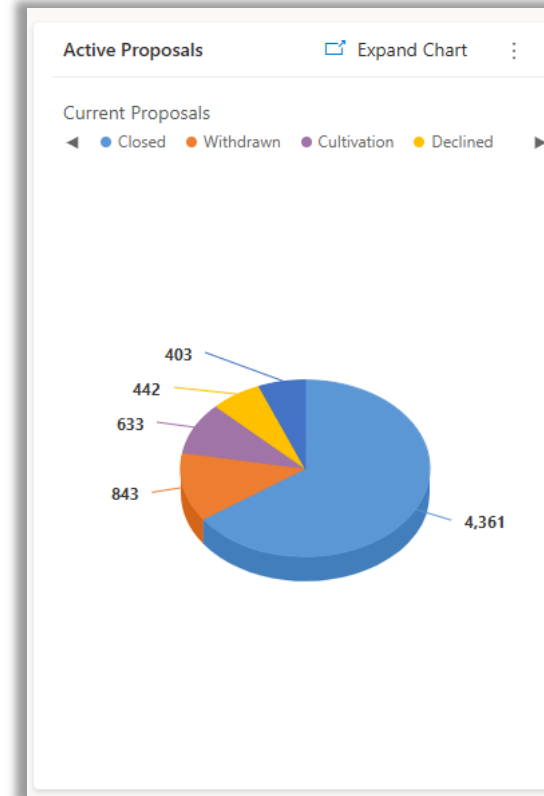
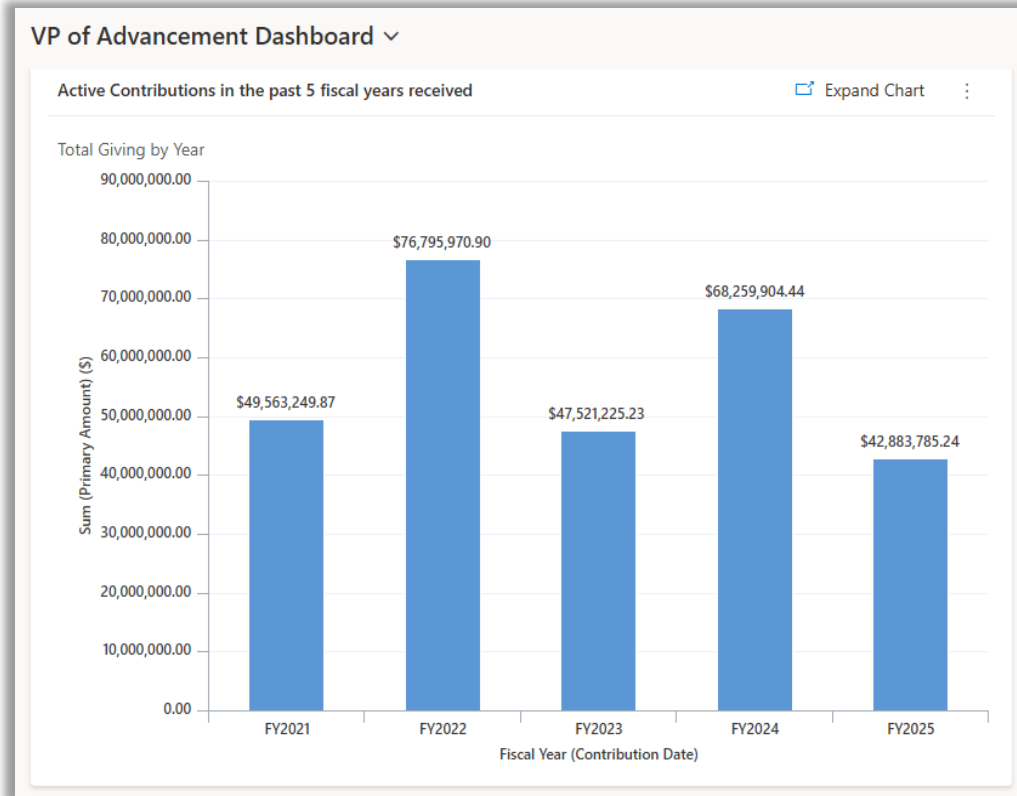
CHANGE MANAGEMENT TIP TOOLS AND CUSTOMIZATION

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TOOLS AND CUSTOMIZATION



Custom Dashboards:



TOOLS AND CUSTOMIZATION

Personalized Entities:

AIPP Admin Dashboard ▾


5 Year Milestone Birthday Next Month

File

1 of 1 100% Find | Next

5 Year Gift Milestone Next Month

Fullname	ID	Primary ID	First Name	Last Name	SP Name	Donor Since	SORTBYDATE	MGS	PGS	ASN	Years Since First Gift
	07/01/1975	July 01								Olivia Coleman-Dunn	50
	07/01/1975	July 01								Amy Burkhardt	50
	07/01/1980	July 01								Ariq Skinner	45
	07/01/1980	July 01			Ariq Skinner						45
	07/06/2015	July 06								Mark Huguely	10
	07/07/1965	July 07								Ariq Skinner	60
	07/08/2015	July 08								Mark Huguely	10
	07/08/2020	July 08								Ariq Skinner	5
	07/08/2020	July 08								Ariq Skinner	5



HAPPY
ANNIVERSARY

TOOLS AND CUSTOMIZATION

Integrated Metrics and Tools and Enhanced Usability:

Send

From: embryk@berea.edu

Tip(s) of the Week

CRM Activity Mark Complete...

1 MB

Good Morning and Happy Friday!

Our tip(s) of the week provide clarification and reminders on CRM Activity Entry.
1) Activity entries are entered on the PROSPECT record.
2) Use the direction field to indicate when a prospect reached out to you.
3) Mark the Activity Complete.

Kindest Regards,
Kelly Vasey Embry
Kelly Vasey Embry
Director of Prospect Management and Data Services
Alumni, Communications and Philanthropy

CRM Tips

Subject

CRM Tip of the Week: viewing Alerts

CRM Tip of the Week: Contact Preferences

CRM Tip of the Week/ Searching Alternate Names

CRM Tip of the Week: looking at Involvements

CRM Tip of the Week: looking at memorial/tribute gift

CRM Tip of the Week: Looking at Contact Preferences

CRM Tip: Locating and Viewing Designations

CRM Tip of the week: Locating records with short ID numbers

CRM Tip of the Week - Timeline Activities

CRM Tip of the Week

CRM Tip of the Week (terminology)

CRM Tip of the Week - Security and Access Policy

CRM Tip of the Week

CRM Tip of the Week

CRM Tip of the Week

Tip(s) of the Week

All

#

A

B

C

D

1 - 17 of 24

MyBerea Events

BEREA COLLEGE

Berea.edu → Prospect Management and Data Services → Records

Records Update Form

Details

Requestor Email *

TOOLS AND CUSTOMIZATION



Key Takeaway

Investing in **tools and customization** transforms your CRM from a generic platform into a **tailored solution** that actively supports your team's day-to-day **tasks and strategic goals**, fostering a more **seamless and engaging transition**.

Effective Change Management and CRM Transformation



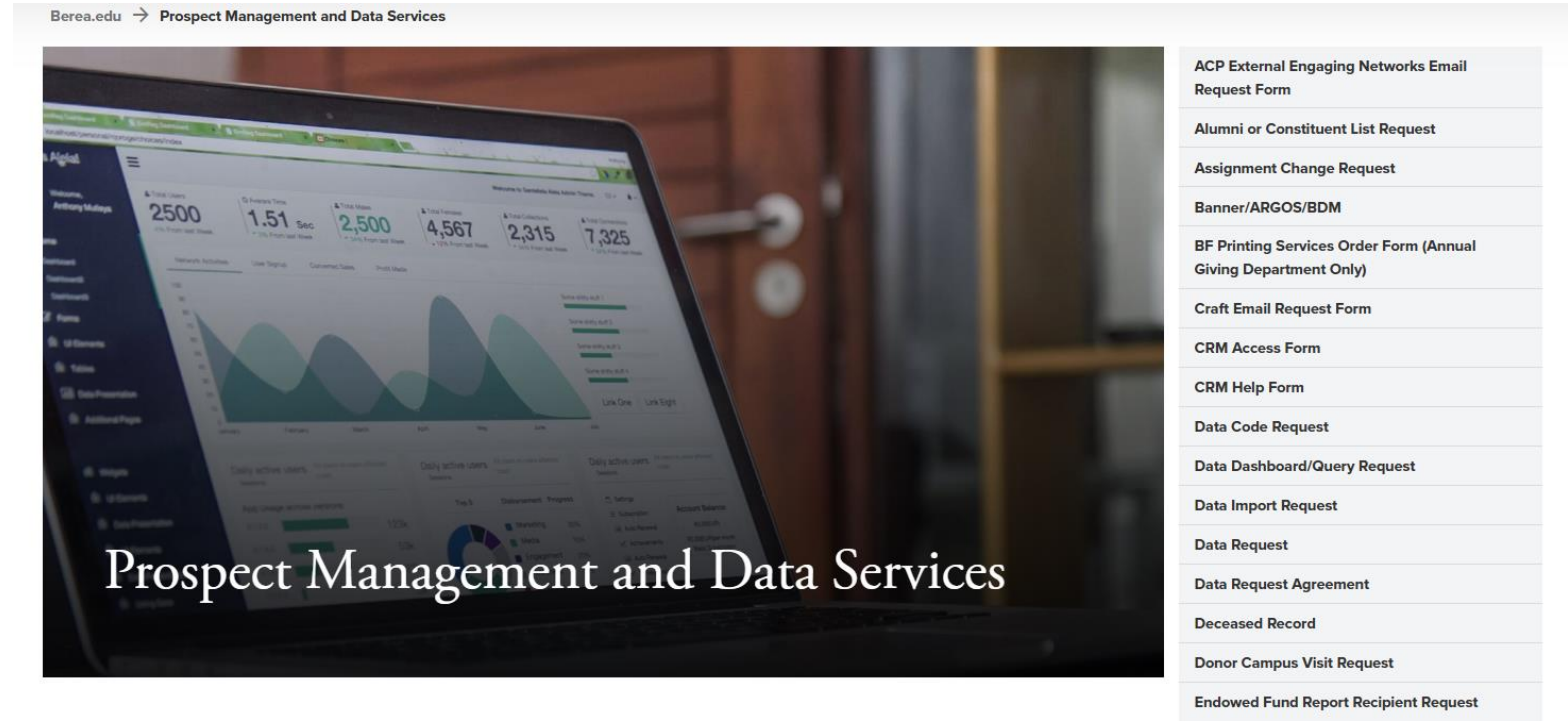
CHANGE MANAGEMENT TIP

CONTINUOUS IMPROVEMENT AND FLEXIBILITY

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CONTINUOUS IMPROVEMENT AND FLEXIBILITY

Proactive Problem-Solving: Cultivate an environment where team members feel comfortable sharing ideas and reporting issues. This proactive approach helps the system evolve in step with the organization's needs.



CONTINUOUS IMPROVEMENT AND FLEXIBILITY

Real-Time Adjustments: Observe how teams are interacting with the system. Use this insight to make tweaks that better align with daily operations.



CONTINUOUS IMPROVEMENT AND FLEXIBILITY

Identify Bright Spots: Actively seek out and celebrate successes within the organization. Replicate these "bright spots" across other teams to encourage system-wide excellence.





CONTINUOUS IMPROVEMENT AND FLEXIBILITY


Key Takeaway

Embracing continuous improvement and flexibility ensures that your CRM system not only meets current needs but also adapts to future challenges, fostering a dynamic environment where positive change is a constant.

POLL #3



APRA Conference 2025

Which aspect of change management do you consider most critical for success? 0 

- ☐ Strategic Prioritization and Planning
- ☐ Cross-Department Collaboration
- ☐ Training and Support Infrastructure
- ☐ Data Integrity and Testing
- ☐ Tools and Customization
- ☐ Continuous Improvement and Flexibility



Which aspect of change management do you consider most critical for success?

PERSONAL CHANGE ROADMAP WORKSHEET

PERSONAL CHANGE ROADMAP WORKSHEET

Section 1: Self-Assessment

Reflect on the key change management themes presented (e.g., Strategic Prioritization, Cross-Department Collaboration, Training and Support, Data Integrity, Tools & Customization, Continuous Improvement).

Guiding Questions

Familiarity Check

- How familiar are you with each of these change management themes?
- Which themes do you feel most comfortable with? Which ones are new or challenging to you?

Rating Your Preparedness

For each theme, rate your current level of comfort and preparedness on a scale from 1 (not comfortable) to 5 (very comfortable).

Strategic Prioritization and Planning: _____
Cross-Department Collaboration: _____
Training and Support Infrastructure: _____
Data Integrity and Testing: _____
Tools and Customization: _____
Continuous Improvement and Flexibility: _____

Overall Readiness

- What is your overall sense of preparedness for the CRM transition?
- Is there one area that stands out as needing immediate focus?

Section 2: Identifying Personal Strengths and Challenges

Guiding Questions

Strengths

List at least two personal strengths or past experiences that will help you navigate this CRM transition or project successfully.

- Example: "I have strong analytical skills that will help me understand new dashboard metrics."

- Strength 1: _____
- Strength 2: _____

Challenges

Identify two potential challenges or areas where you feel less prepared during this transition.

Example: "I struggle with learning new software interfaces quickly."

Challenge 1: _____

Challenge 2: _____

Section 3: Developing Your Personal Action Plan

Guiding Questions

Goal Setting

Based on your self-assessment, which one or two areas do you want to improve first?

Area 1: _____

Area 2 (optional): _____

Action Steps

For each chosen area, outline three actionable steps you can take.

For Area 1:

Action Step 1: _____

Action Step 2: _____

Action Step 3: _____

For Area 2 (if applicable):

Action Step 1: _____

Action Step 2: _____

Action Step 3: _____

Timeline

What are the realistic deadlines for each action step?

For example, "Complete training module by the end of the week."

Action Step 1 Deadline: _____

Action Step 2 Deadline: _____

Action Step 3 Deadline: _____

Section 4: Reflecting on Continuous Improvement

Guiding Questions

Monitoring Progress

- How will you monitor your progress on your personal action plan?
- What specific indicators or milestones will tell you that you are making progress?

Feedback and Adjustments

- How will you gather feedback on your progress?
- What steps will you take if you find that your initial plan isn't working as expected?

Future Considerations

- What additional support or resources do you need to ensure ongoing success during the CRM transition?
- Are there any questions or topics you want to discuss further with your supervisor or team lead?

Final Reflection

Personal Commitment

Write a short statement (2-3 sentences) summarizing your commitment to your personal development during this transition.

○

○

○

This digital worksheet is designed to help you reflect, plan, and take actionable steps to ensure a smooth and successful transition. Use your responses to guide your next steps and to discuss any needs or insights with your team or supervisor. Enjoy the process of growing your skills and confidence during this period of change!



Questions?



apra



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KELLY EMBRY
EMBRYK@BEREA.EDU

THANK YOU!

Please complete your session
evaluations in the mobile app.



apra