

August 16, 2023 Coffee Chat Nuggets, Alan Gibson update

Attendance: 29

Launch Fall 2024

Good content in articles posted on Launch Pad. Change ambassador videos are available for viewing from Launch pad links.

Workstream 1 is nearing completion. Bio data is the primary function. Right now, data is changed through accounts.psu.edu which then pushes data out to system. Driven by PSU email/id accounts. A new problem is how to update data for those without PSU email. Working on designing portals for those folks. Working on integration structure to develop consistent data that can be shared.

Marketing Cloud being structured to be used University wide with specifics to DDAR. Alumni chapters can enter information. Will create an information flow that is current. Can see real time activity. This workstream launched in July. By June 20, 2024, Chapters should be able to use the system for events, email and websites.

This system will be used by others in addition to development. Those users won't be able to see giving details but will be able to see affinities for specific individuals.

Change Ambassadors is focus of training. January 2024 training launch for the entire division. You don't have to be change ambassador to participate. You can be added to the TEAMS channel just ask Alan to be added.

Change Ambassador are embedded in units to help during training sessions and follow-up learning.

Trailhead learning gives you a basic understanding of the process. Doesn't give you specific training related to development. When sand boxes open those specifics will be available.

The only way training works is if we are all doing it together and helping each other.

ChatGPT privacy of data isn't secure. If you use private ASA data, it then becomes publicly accessed.

Working on a controlled GPT framework, starting with contact report formats. Working on a GPT framework to use for consistency in contact reports. Will help to make them more searchable with specific questions. Reports will need to be signed by the fund raiser for consistent detail and updates.

Possibly available in the first quarter of 2024. Must do this in a controlled and safe manner to keep it beneficial to the institution.

Give Campus: multi stack product like IModules, volunteer management. Give Campus will replace all current systems. Will give us a new giving platform that will be more fluid. Will replace Raise website and allowing Venmo and Pay Pal as giving options. Aligns with Affiniquiest flow of gift processing.

Terminology link: <https://pennstateoffice365.sharepoint.com/sites/DDARISTrainingResources>

Click on enterprise CRM, advancement RM to get to Affiniquiest terminology.

Click on 7/14 for walkthrough of system. 1 hour video. Also see excel list for possible trails by job function.

There are also linked in learning options for Salesforce.

Providing feedback to leadership available on Launchpad: use Agility/Efficiency recommendations link on top bar of landing page. This can be anonymous.