

# GAIL 2018

Survey Summary: Part Two  
(The Feedback)



**SURVEY  
SAYS...**

# Q5A

## What info is not up to date?

**Response:** “Current students education (major)/anticipated graduation date are not always accurate. Not all academic majors listed.”

**Answer:** The majors and estimated graduation dates for current UGA students are updated every semester. This information comes from the Registrar’s office banner system.

**Response:** “Names are frequently not linked for married couples...”

**Answer:** The Records team does not currently have a resource/vendor for identifying marriage records. If you pull an acknowledgement report, or process a postal mail marketing effort, and you see a couple that is not linked, please update or forward this information to Records ([records@uga.edu](mailto:records@uga.edu)).

# Q5A

## What info is not up to date?

**Response:** Contact Information (Email, Phone, Mailing Address)

**Answer:** Individual's change their contact information frequently. This could be the result of buying a new home, damaging a cell phone, graduating from UGA, or countless other reasons. GAIL houses over 600,000+ individual constituent records. The Records team runs an Address Finder process 4 times a year to update constituent records with the most recent contact information. It's important that our 600+ GAIL users provide assistance between these major uploads. This means frequently updating contact information on a constituent's record. We encourage our users to make updates themselves or send the information to Records. It takes a community to build the accuracy of GAIL.

# Q5A

## What info is not up to date?

*Response:* Employment Information

*Answer:* UGA employment information is updated by HR 3 times a year. LiveAlumni runs 4 times a year and updates our alumni employment. The UGA Career Center provides a list of recent graduates' employment once a year. Each of these batch processes add and update thousands of constituent records. Along with these mass uploads, we also have our Records team who updates employment through information provided via [records@uga.edu](mailto:records@uga.edu). The Prospect Research team also makes employment connections as they research potential prospects. However, there are still 600,000+ individuals in GAIL. That's why we highly encourage every GAIL user to update constituent employment information when it is discovered. The more GAIL users that contribute to the system, the more accurate GAIL becomes.

# Q6A

## What info is difficult to find?

**Response:** “You have to move between too many pages to pull the basics of contact information, interactions, wealth ratings, relationships, and giving.”



**Answer:** In August 2017, a new tab was added to the individual constituents' profile called UGA Dashboard. This tab houses most constituent information on one page, eliminating the need to navigate multiple tabs/pages.

# Q6A

## What info is difficult to find?

**Response:** “How a constituent is connected to/involved in the University (programs, organizations). I understand where in their profile this information should be, but it is not always there.”

**Answer:** We try to encourage every school/college/unit to update their constituents’ educational involvements and update their respective groups’ members as much as possible.

**Response:** “Because I use GAIL when I'm in the office, things change and keeping up on changes while being a front line fund raiser is difficult.”

**Answer:** In an effort to connect with our users and provide the best customer support possible, GAIL is always changing and being updated. Because of this, the office of Client Services offers multiple avenues of instructional aids to make the learning curve a little easier. We are also always available and happy to answer any questions you might have over the phone or via email.

# Q6A

## What info is difficult to find?

**Response:** “Frequently, people have nicknames or pen names and if I don't know that, I can't find them.”

**Answer:** When searching for a constituent, you can use your advanced search options to look for individuals who might be called by another name.

### Advanced search options

Search in:  Individuals  Organizations  Groups/Households

<input checked="" type="checkbox"/> Check nickname	<input checked="" type="checkbox"/> Only search primary addresses
<input checked="" type="checkbox"/> Check aliases	<input checked="" type="checkbox"/> Include deceased
<input type="checkbox"/> Check alternate lookup IDs	<input type="checkbox"/> Include inactive
<input type="checkbox"/> Check merged constituents	<input type="checkbox"/> Include fuzzy search on name

 Hide advanced search options

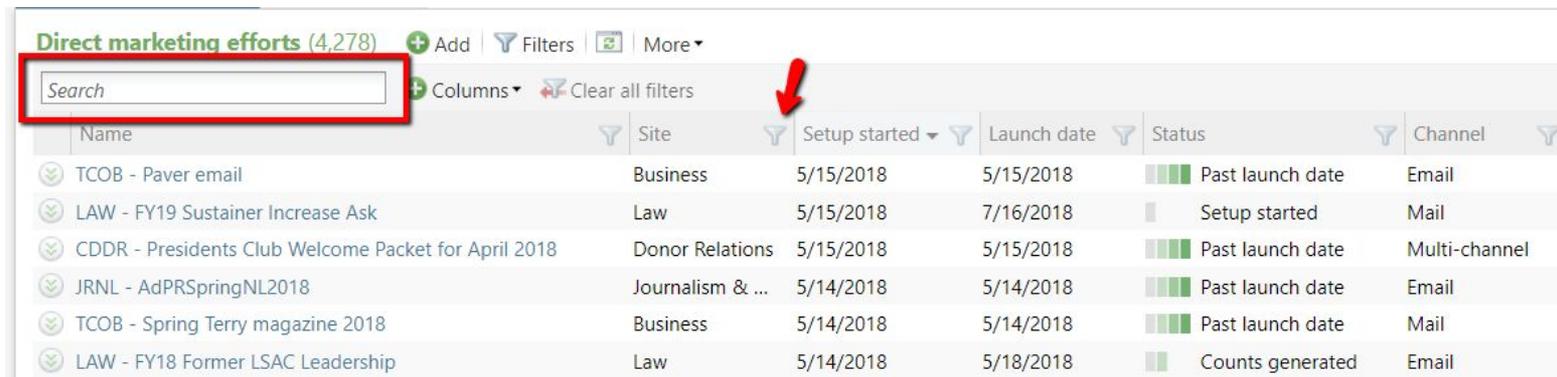
**Response:** “With GAIL, you pretty much have to know who you are looking for before you can find them.”

**Answer:** Typically in GAIL when searching for an individual you know at least a little bit of information about the person. Are they a donor? Alumnus? Do they live in Georgia? You can search for a constituent using many different criteria.

# Q6A

## What info is difficult to find?

**Response:** “Past marketing efforts are difficult to locate because there is no search function.”



The screenshot shows a table titled "Direct marketing efforts (4,278)". At the top, there are buttons for "+ Add", "Filters", and "More". Below these is a search box labeled "Search" (highlighted with a red box), a "Columns" dropdown, and a "Clear all filters" button (with a red arrow pointing to it). The table has columns for Name, Site, Setup started, Launch date, Status, and Channel. The data rows are as follows:

Name	Site	Setup started	Launch date	Status	Channel
TCOB - Paver email	Business	5/15/2018	5/15/2018	Past launch date	Email
LAW - FY19 Sustainer Increase Ask	Law	5/15/2018	7/16/2018	Setup started	Mail
CDDR - Presidents Club Welcome Packet for April 2018	Donor Relations	5/15/2018	5/15/2018	Past launch date	Multi-channel
JRNL - AdPRSpringNL2018	Journalism & ...	5/14/2018	5/14/2018	Past launch date	Email
TCOB - Spring Terry magazine 2018	Business	5/14/2018	5/14/2018	Past launch date	Mail
LAW - FY18 Former LSAC Leadership	Law	5/14/2018	5/18/2018	Counts generated	Email

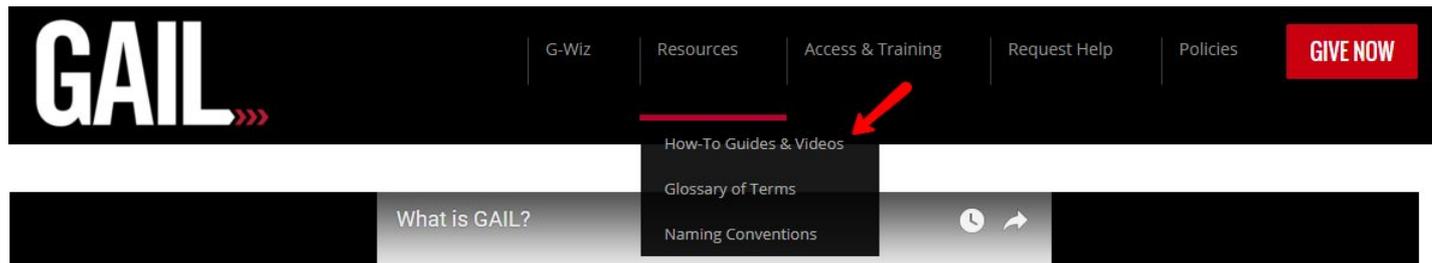
**Answer:** On the direct marketing efforts page, there is a search box that will let you search for marketing efforts by name. You can also click the filter button on any of the column headers to filter by site or by creation date.

# Q8

## What info would you like included in Tips & Tricks?

**Response:** “More video lesson how to’s. More event planning module tips and tricks.”

**Answer:** All previous T&T videos are located in the resources tab on the GAIL website. If you need a specific video guide that is not already provided, please email [askit@uga.edu](mailto:askit@uga.edu).



**Response:** “Bio of employees within Advancement Services with a picture so we can get to know the people behind the service.”

**Answer:** The GAIL website will soon have a new “Who is GAIL?” page that highlights the teams behind our GAIL processes. Check out our June T&T for a spotlight on the Records Management team.

# Q8

## What info would you like included in Tips & Tricks?

**Response:** “How to pull reports relevant to us.”

**Answer:** From the GAIL resources website, hover over the Resources tab in the top menu. A Reports Glossary has been added to the drop down menu. This glossary lists all the available reports and a brief description of each.

**Response:** “I would like reminders on how best to look at existing funds and their fund agreements.”

**Answer:** From the fundraising functional area, use the purpose search to look-up a specific fund. Agreements will be located on the fund’s page within the OneSolution tab.

### Fundraising

-  Designation search
-  Purpose search 
-  Campaign search
-  Campaign hierarchy search

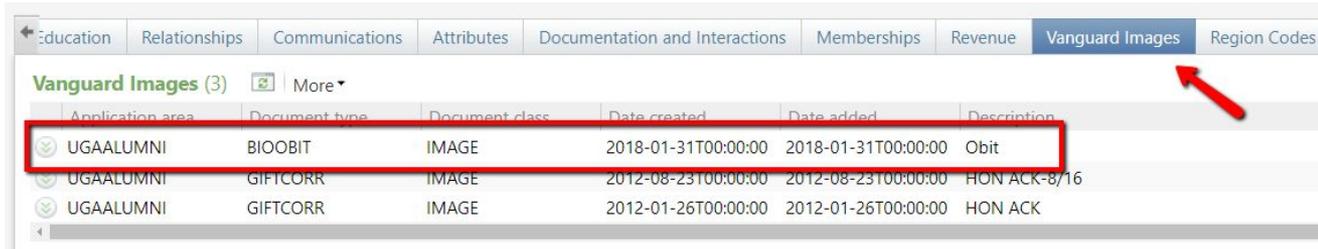
One Solution Fund Agreements	Goals	Donor Information	Hierarchies	Financial Information
<b>One Solution Fund Agreements</b> (1)  More ▾				
Document ID	Description	Created Date		
782910	Fund Agreement	11/25/2014		
 View Fund Agreement				

# Q8

## What info would you like included in Tips & Tricks?

**Response:** “How to look up death certificates.”

**Answer:** When an obituary or death certificate is located for a deceased individual, the image is added to the *Vanguard Images* tab on the constituent profile.



Application area	Document type	Document class	Date created	Date added	Description
UGAALUMNI	BIOOBIT	IMAGE	2018-01-31T00:00:00	2018-01-31T00:00:00	Obit
UGAALUMNI	GIFTCORR	IMAGE	2012-08-23T00:00:00	2012-08-23T00:00:00	HON ACK-8/16
UGAALUMNI	GIFTCORR	IMAGE	2012-01-26T00:00:00	2012-01-26T00:00:00	HON ACK

**Response:** “Query Info”

**Answer:** Currently only an estimated 50 users have access to query in GAIL. This is why query information does not show up on T&T frequently. However, all past T&T query posts can be viewed on the GAIL blog by choosing the category “query”. If you’d like specific query information posted for T&T, please email your suggestions to [askit@uga.edu](mailto:askit@uga.edu)

# Q8

## What info would you like included in Tips & Tricks?

**Response:** “An increased importance on updating records. Every aspect of GAIL is important but if there was a way to further stress the importance of record maintenance I think that would help everyone whether they directly see it or not.”

**Answer:** We highly encourage all of our GAIL users to update constituent records as often as they can. This is stressed both in trainings and Client Services consultations. One idea that has recently been discussed is hosting a records updating contest. However we’d love to hear any recommendations from you for motivating our GAIL users!

**Response:** “An easy way to pull a list of emails from event registrations.”

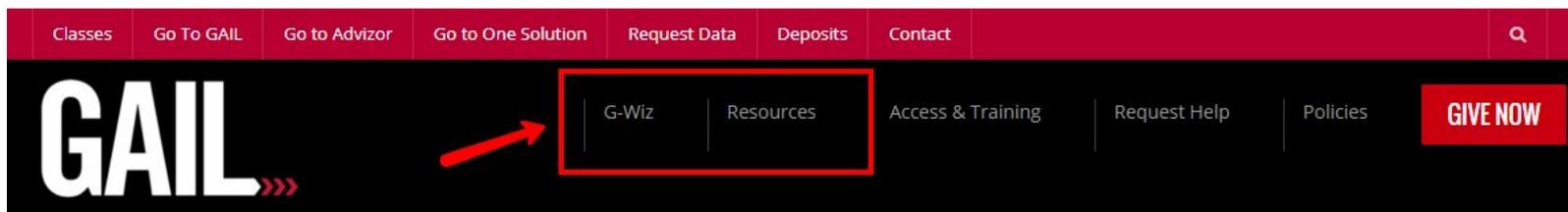
**Answer:** The GAIL events module has the ability to gather emails from all your event registrants in order to contact them with additional event information. If you need a shortcut guide to completing this process, please refer to G-Wiz!

# Q10

## What instructional aides would you like to have?

**Response:** “Something simpler. It's too difficult to keep up on GAIL with everything else required of me.”

**Answer:** Every GAIL user has their own unique learning style. What is simple for one user, may not be simple for another user. That’s why the Client Services team offers more than one avenue of training materials. We have PDF guides, video tutorials, infographics, flowcharts, and our recently added G-Wiz. You can find all of these aides on the GAIL website in the black menu bar at the top of each page. If you need some other type of training aid, please email [askit@uga.edu](mailto:askit@uga.edu) with your suggestions.



# Q10

## What instructional aides would you like to have?

**Response:** “I would like to know how to create my own segments.”

**Answer:** Both a PDF guide and video tutorial for creating segments can be found at: [www.dar.uga.edu/GAIL/guides](http://www.dar.uga.edu/GAIL/guides)

**Response:** “A smaller version of the Step by Step PDFs that is notecard size, for our MGOs to tape on their monitors.”

**Answer:** The prospect management simplified guidelines can absolutely be formatted into notecard sized instructions. This suggestion has been added to the Client Services active projects list. More news will be provided soon!

**Response:** “I am really excited about the potential of G-Wiz for constituent updates.”

**Answer:** The Client Services team is currently in the early beginning stages of developing a G-Wiz for constituent record updates. We will keep GAIL users informed as it progresses. Currently the estimated release date is set for Fall 2018.

# Q10

## What instructional aides would you like to have?

**Response:** “When I first started using GAIL, I think I used the PDF's and my notes from classes mainly. I rarely refer to instructions anymore, because if I have a question it's usually fairly specific. I may search the archives, but sometimes I miss items if I'm not entering search terms exactly. This would be a lot of work, but it might be helpful if blog entries had tags that you could link to articles on a subject from the glossary.”

**Answer:** This is an excellent idea and one our team had not considered before! This idea has been added to our active projects list. Please keep checking back with our Tips & Tricks newsletter to see updates on this enhancement.

**Response:** Taking problems/issues users have encountered and providing best practices-based ways to solve them.

**Answer:** The Client Services team has recently been working on a FAQ page that will be an upcoming new addition to the GAIL resources website. This FAQ will include answers to frequently asked GAIL questions as well as troubleshooting instructions for common issues in GAIL.

# Q12

## What improvements can be made to the events module?

**Response:** “The transition from pending reservations take a long time...”

**Answer:** Pending reservations are processed manually at the end of each business day by the Gift Accounting team. This concern has been shared with them for future pending registrations.

**Response:** “I guess eventually we may be able to sit down with the Foundation and get some training in the future on setting up invitations through GAIL in our office. I think it is just overwhelming to see the multitude of information and trying to filter through it all just to get the small amount of information that our office needs.”

**Answer:** The Advancement Services unit has a whole team dedicated to training and supporting users on managing events in GAIL. Any new process feels overwhelming at first, but we offer unlimited assistance as well as tons of instructional aids to help the transition become familiar. We are happy to meet with you to go over your specific needs.

# Q12

## What improvements can be made to the events module?

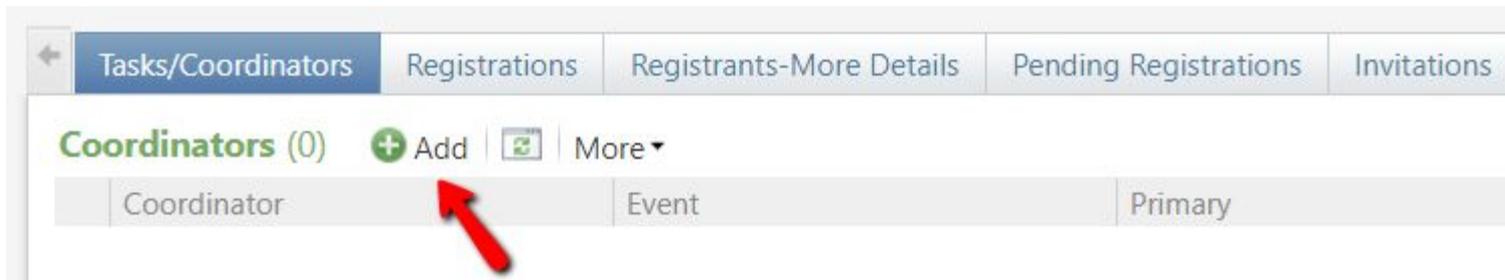
**Response:** “The online registration page is really difficult to navigate for older constituencies, and seems not to work on all web browsers. A simplified registration page would be ideal.”

**Answer:** We understand that some older constituents may not be comfortable with registering for an event online. Event coordinators have the ability to RSVP for invitees within their GAIL event module for those constituents who are unable. Usually when an invitee is unable to access the event registration page, it is because the email invitation URL was incomplete. Our web team is currently working on a simplified registration page that we hope everyone will love. Stay tuned!

# Q12

## What improvements can be made to the events module?

**Response:** Events hosted by a committee, rather than an individual



Coordinator	Event	Primary

**Answer:** You can select a committee as the host for your event by choosing the coordinators tab on your event module and searching for the name of the committee.



**Add a coordinator**

Event:

Coordinator:

Is primary

Help Save Cancel

# Q12

## What improvements can be made to the events module?

**Response:** When you're in an individual's event registration page it would be helpful to have a live link to their constituent record.

**Answer:** When on the constituent's registration page, you will find the link to their record located in the tasks bar on the left side of the screen under the header *other information*.

**West , Ms. Leslie Kirsten - Event Registrant**

	123 Meigs Street Athens, GA 30605 +1 (456) 444-1230 lesliekwest@gmail.com	Registrant ID: evreg-10248122 Type: Preregistration Status: Registered No. of guests: 0	Total registration fees: \$0.00 Total paid: \$0.00 Balance: \$0.00 Total receipt amount: \$0.00	Payment history:
--	--	--	--	------------------

Registrations Benefits Lodging and Travel Restrictions Attributes

**Registrations** Edit

**West , Ms. Leslie Kirsten**

**Other information**

- Edit registrant
- Edit registrant ID
- Delete registrant
- Link opportunity
- Mark as will not attend
- Mark as attended
- Mark as not no-show
- Mark as canceled
- Add as an event speaker
- Go to constituent**

# Q12

## What improvements can be made to the events module?

**Response:** “Help users identify where to find the tab that lists registrants and "registrants -- more details". Sometimes event managers only click on "registrations", and wonder where the rest of their attendee information is.”

**Answer:** Although the names are similar, the Registrations tab and the Registrants-More Details tab contain different information and have different functions. For more facts about the differences between these two tabs on your events module, please be on the lookout for a Tips & Tricks article titled *“Registrations Tab vs. Registrants-More Details Tab.”*

**Response:** “Better control over which email the system is sending to. Primary is not always the best email depending on the type of communication.”

**Answer:** Currently the events module will allow you to choose the residence or business mailing address, but at this time we cannot choose which constituent email address we send to. The Advancement Services team has put a request in to Blackbaud to allow this feature in the future.

# Q12

## What improvements can be made to the events module?

**Response:** “More functionality for multi-tier events...”

**Response:** “Simplifying the process of figuring out how to structure multi-level events.”

**Answer:** The task of providing more features to our GAIL modules while at the same time simplifying its processes is something that the Advancement Services team is constantly working to accomplish. We understand that what might be simple for one person might not be easier for another. We also know that as a large University, our many users have various needs of functionality. If you have any specific ideas for new features or simplifying events, please let us know!

**Response:** “Specifically with invitations, I need to see what selections and exclusions I used. I often try to make notes in the description, but I forget or question if I used the correct exclusions.

**Answer:** We are also anxious to have this feature added into our events module! As of now the events module is not as robust in its functionality as we would prefer. We hope to change that! We currently have a ticket open with Blackbaud to add the ability to view added selections and exclusions.

# Q12

## What improvements can be made to the events module?

**Response:** “The ability to download an Excel sheet where the nametags are formatted (Leslie West, ABJ '11, MPA '18).”

**Answer:** The Registrants-More Details tab now offers degree abbreviations in the Excel output to make creating name tags for events easier. Also, Client Services has created a generic “Name Tags” Word merge template file that can be shared with you at your request to [askit@uga.edu](mailto:askit@uga.edu).

Tasks/Coordinators Registrants Registrants-More Details Pending Registrations Speakers Expenses Options Invitations

Event Registrants (17) More ▾

- Download to CSV
- Download to XLSX
- Autosize all columns
- Restore grid defaults

GraduationDate1	Degree1	Major1	DegreeArea1	DegreePreferredClassOfAbbrev1	GraduationDate2	Degree2	Major2	DegreeArea2	DegreePreferredClassOfAbbrev2
2002	BS-Bachelor of Science	COMPUTER SCIENCE	Arts & Sciences	BS '02					
1999	BBA-Bachelor of Business Administration	MGMT INFO SYSTEMS	Business	BBA '99					
1995	BSED-Bachelor of Science in Education	SCIENCE EDU	Education	BSED '95	1999	MED-Master of Education	SCIENCE EDU	Education	MED '99
2012	BMUS-Bachelor of Music	MUS PERFORMANCE	Arts & Sciences/Music	BMUS '12					
2012	AB-Bachelor of Arts	ENGLISH	Arts & Sciences	AB '12					
2001	AB-Bachelor of Arts	STUDIO ART	Arts & Sciences/Lamar	AB '01					

# Q12

## What improvements can be made to the events module?

**Response:** “I heard a rumor that there could be a barcode added for events in the future that can be scanned at the event and could automatically check someone in and mark them as attended. That would be SUPER helpful.”

**Answer:** We have also heard that rumor... We will keep GAIL users updated as this potential upgrade progresses!

**Response:** I think the declined invitation RSVP portion could be better explained. I haven't understood the difference between decline and will not attend.

**Answer:** A constituent should be marked as declined if they were invited to an event, but RSVP's that they could not attend. A constituent is marked as “will not attend” when they have *already* registered for the event, but then are eventually unable to attend. Marking a constituent as “will not attend” also alerts Gift Accounting that the paid event registration fee should be refunded.

# Q12

## What improvements can be made to the events module?

**Response:** “It might be beneficial to have the option to register someone more than once for a single event. For example, in a tiered event at GMOA, someone registered for a Friday night party as well as to participate in the part of the event taking place on Saturday. I had to register them as "unknown guest" rather than using the person's name.”

**Answer:** If you create a multi-level event in GAIL, you can register an individual for multiple “events” by using the scroll bar on the right to view the available events and selecting the ones that apply.

**Add a registrant**

Registrant: West, Ms. Leslie Kirsten  Preregistration  Walk-in registration **Total registration fees: \$0.00**  
Receipt amount: \$0.00

Packages: Single Events Name Tag

DAR - Leslie's Test Event - Single Events  
DAR - Leslie's Test Event(Thursday, May 17, 2018)

Registration option	Registration fee	Registrants Benefits	
Complimentary	\$0.00	1	
Registration option		Registrant	Waive registration fee
Complimentary		West, Ms. Leslie Kirsten	<input type="checkbox"/>
*			<input type="checkbox"/>

Friday Night Meet and Greet(Thursday, May 17, 2018)

Registration option	Registration fee	Registrants Benefits	
Registration option		Registrant	Waive registration fee
*		West, Ms. Leslie Kirsten	<input type="checkbox"/>
			<input type="checkbox"/>

Help Save Cancel

# Q12

## What improvements can be made to the events module?

**Response:** “Need to be able to say no to an event.”

**Answer:** The advancement services team has reached out to Blackbaud regarding this module improvement. We are still heavily advocating for this option and will keep GAIL users updated as we continue to communicate with Blackbaud.

**Response:** “Confirmations that can either be sent automatically, or by hand.”

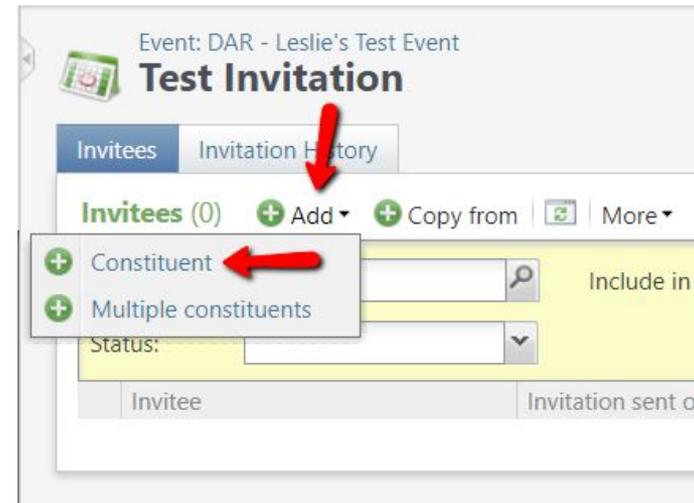
**Answer:** When a constituent registers for an event online, they are automatically sent a confirmation email. However, if your school or unit wants to send a follow-up confirmation email, you can easily do this through the invitations tab of your event. Please refer to G-Wiz for an easy walk-through guide on how to communicate with your event registrants.

# Q12

## What improvements can be made to the events module?

**Response:** “The ability to cc assistants on sent emails.”

**Answer:** To ensure that staff members also receive an event email, you can add them one at a time from the invitees screen.



**Response:** “Different sign up pages for different levels of attendees.”

**Answer:** When you request your online event registration page through ASKIT, you can ask that different registration levels be separated on to multiple registration pages.

# Q12

## What improvements can be made to the events module?

**Response:** “An option to select more than one registrant to mark attended.”

**Answer:** To update the attendance for multiple registrants, choose “update event attendance” from your task options.

The screenshot displays the 'DAR - Leslie's Test Event' management interface. On the left, a 'Tasks' sidebar lists various actions, with 'Update event attendance' highlighted by a red arrow. The main content area shows event details for '5/17/2018' with a status of '100%'. A modal dialog titled 'Update event attendance' is open, containing the text 'Update all registrants whose attendance is unspecified to:' and two radio button options: 'No-show' and 'Attended'. A red arrow points to the 'Attended' option. Below the dialog, a 'Registrations (5)' table is visible, listing registrants and their status.

Registrant	Type	Status	Attended	Online
Bond, Cindy M.	Preregistration	Registered		
Clark, Derek W.	Preregistration	Registered		
Engesser, Olivia E.	Preregistration	Registered		
Harmelink, Gregory L.	Preregistration	Registered		
West, Leslie K.	Preregistration	Registered		

# Q12

## What improvements can be made to the events module?

**Response:** “I'm using Smilebox, a design program I personally pay for that I can create a unique invite - much like Evite. I would like to learn more about sending invitations through GAIL. I've been to training but I have never seen examples of invitations sent through GAIL.”

**Answer:** We have seen so many creative and beautiful emails created with our BEE editor and sent through GAIL. If you'd like to see examples of its design capabilities, please email [askit@uga.edu](mailto:askit@uga.edu).

**Response:** “Can the Registrants-More Details names be clickable links like on the registrations tab?”

**Answer:** A great idea for improvement! The Registrants-More Details tab has now been updated to include clickable links for constituents.

# Q12

## What improvements can be made to the events module?

**Response:** “Information that auto-populates so attendees do not have to write in their name, address, etc.”

**Answer:** If an event invitee logs in to [gail.uga.edu](http://gail.uga.edu) before registering for the event, it will pre-populate their name and contact information. We have the ability to allow this pre-populating behavior without the need to login to [gail.uga.edu](http://gail.uga.edu), however in the past this has caused several undesired side effects.

**Response:** “I wish we could pull unique attendees, rather than Mr. Jones and Mr. Jones guest. Wish we could have each unique rsvp accounted for.”

**Answer:** GAIL is able to associate event invitees to their constituent profiles by gathering general information (like an email address) upon their registration for the event. If a host’s guest’s name is provided, along with contact information, and the constituent already exists in GAIL, the connection will be made so that the individual does not appear as “guest of”. However, if only the name of the guest is given, GAIL does not have enough information to make the association. Event managers are encouraged to keep track of their “guest of” registrants and manually connect the individual to their constituent profile. This can easily be done through the events module of GAIL.

# Q12

## What improvements can be made to the events module?

**Response:** “The ability to program reminders.”

**Answer:** GAIL users already have the ability to program email alerts to remind them of event planning tasks. The events module can also send follow-up communications to invitees to remind them to RSVP/register for an event. If neither of these are the type of reminder you are referring to, please contact us at [askit@uga.edu](mailto:askit@uga.edu).

**Response:** “Better downloading options where you could only download specific information - such as name tags.”

**Answer:** From the Registrants-More Details tab you can download a spreadsheet of registrant information including lookup ids, dietary restrictions, UGA degrees, revenue history, name tags, and more. While there is not currently an option to pick and choose which specific information categories get downloaded, the easiest solution is to remove the information you don't need from the provided download.

# Q13

## What improvements can be made to marketing efforts?

**Response:** “Is there a G-Wiz for Direct Marketing Efforts?”

**Answer:** Yes! In February 2018 we announced the launch of G-Wiz (GAIL Communications Wizard). This “choose your own adventure” guide will help you send communications through both marketing efforts and events. You can find G-Wiz at [www.dar.uga.edu/GAIL/g-wiz](http://www.dar.uga.edu/GAIL/g-wiz)

**Response:** “It would be nice to have somewhat of a dictionary to reference for each area.”

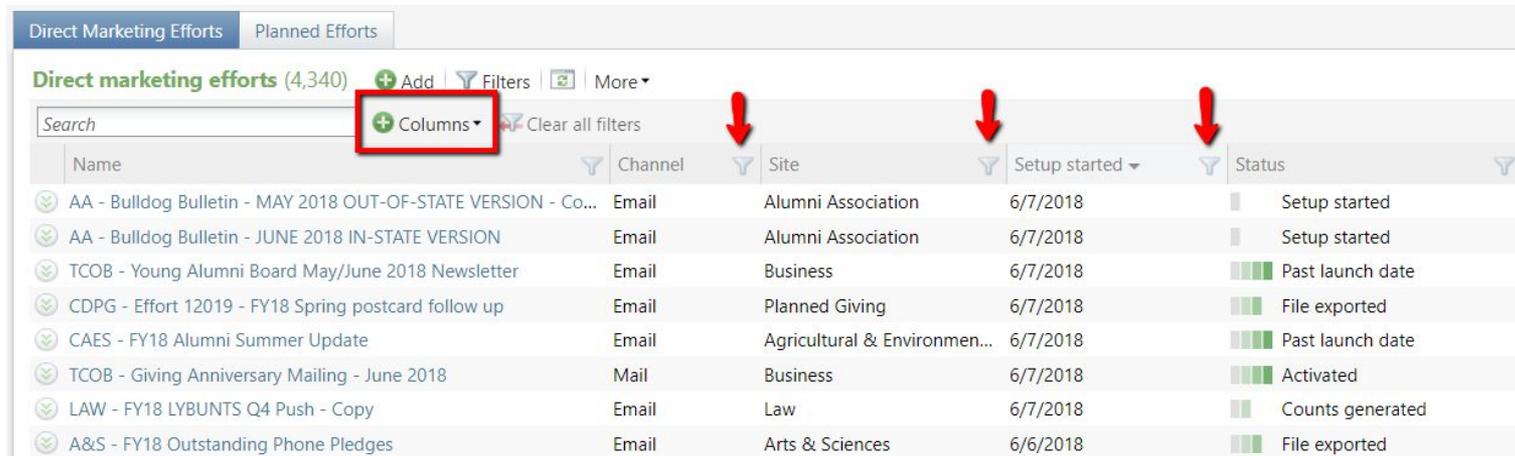
**Answer:** There is a GAIL Dictionary located on the GAIL website within the resources tab. This dictionary was created shortly after GAIL first launched. The Client Services team has recently updated this dictionary to add new terms and new features for more functionality.

# Q13

## What improvements can be made to marketing efforts?

**Response:** “Easier navigation via search tools.”

**Answer:** The main marketing effort listing page is highly customizable depending on the needs of the user. For example, you can click the filter icon next to any of the column headers to show only marketing efforts specific to your school/unit or only marketing efforts that were created by a specific individual. You can add additional columns of information by choosing the *columns* button. The best part is that all of your set filters will be sticky which means GAIL will remember your filters the next time you access this page.



The screenshot shows the 'Direct Marketing Efforts' interface. At the top, there are tabs for 'Direct Marketing Efforts' and 'Planned Efforts'. Below the tabs, there is a search bar and a '+ Columns' button highlighted with a red box. To the right of the search bar are 'Filters' and 'Clear all filters' options. The main table has columns for Name, Channel, Site, Setup started, and Status. Red arrows point to the filter icons for Channel, Site, and Status. The table contains several rows of marketing efforts with their respective details.

Name	Channel	Site	Setup started	Status
AA - Bulldog Bulletin - MAY 2018 OUT-OF-STATE VERSION - Co...	Email	Alumni Association	6/7/2018	Setup started
AA - Bulldog Bulletin - JUNE 2018 IN-STATE VERSION	Email	Alumni Association	6/7/2018	Setup started
TCOB - Young Alumni Board May/June 2018 Newsletter	Email	Business	6/7/2018	Past launch date
CDPG - Effort 12019 - FY18 Spring postcard follow up	Email	Planned Giving	6/7/2018	File exported
CAES - FY18 Alumni Summer Update	Email	Agricultural & Environmen...	6/7/2018	Past launch date
TCOB - Giving Anniversary Mailing - June 2018	Mail	Business	6/7/2018	Activated
LAW - FY18 LYBUNTS Q4 Push - Copy	Email	Law	6/7/2018	Counts generated
A&S - FY18 Outstanding Phone Pledges	Email	Arts & Sciences	6/6/2018	File exported

# Q13

## What improvements can be made to marketing efforts?

**Response:** “Anything to make creating a Direct Marketing Effort more streamlined would be great!”

**Response:** “Fewer steps so it's less confusing.”

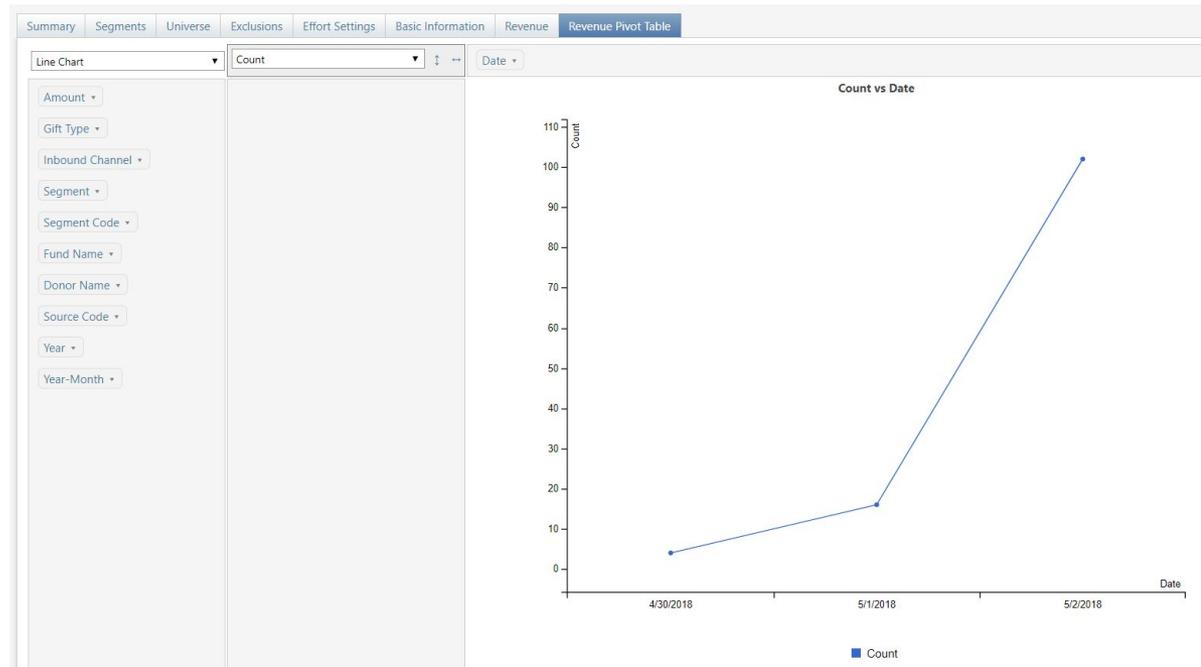
**Answer:** Every step in the marketing effort process is important. Removing steps means reducing functionality. This is counterproductive as our GAIL users are constantly making requests for more functionality. We try to reduce additional screens and clicking when we can. Now when you create a marketing effort, you will see a new tab called the “DME Dashboard.” Taking cues from the popular constituent UGA Dashboard, the DME Dashboard will place your source code, address processing options, exclusions, and segments all on one screen. This serves not only as a visual checklist but also a way to reduce time spent setting up the marketing effort. You can also use the marketing effort templates that were created for each school/unit by the Client Services team to reduce your steps.

# Q13

## What improvements can be made to marketing efforts?

**Response:** “Could we add a timeline of when gifts appear on the marketing efforts? I'm thinking like a line graph of some sort with dates along the y-axis and number of gifts along the x.”

**Answer:** In December 2017 the Advancement Services team released a new tab located within marketing efforts called the Revenue Pivot Table. This tab displays DME revenue in multiple graph styles and with different data factors.



# Q13

## What improvements can be made to marketing efforts?

**Response:** “I think it's strange that the only way to add an email to a package is to search through the MASSIVE list of packages and then hit "edit". Unless something has changed and I'm unaware, I can't type in the name of the package, find it, then select it and add the email.”

**Answer:** You can easily search for the name of your package by navigating to the marketing and communications functional area and selecting Packages, then choosing Package Search. When the package search pop-up window appears, you will have the option to search for your package by name or by your school/unit. You can shortcut the package search option by navigating to your home screen and clicking customize.

### Packages

-  Creatives
-  Export definitions
-  Letters and documents
-  Materials and expenses
-  Email marketing
-  Packages 

### Packages

-  Package search 
-  View packages
-  Add a mail package
-  Add an email package
-  Add a phone package
-  Add a public media package

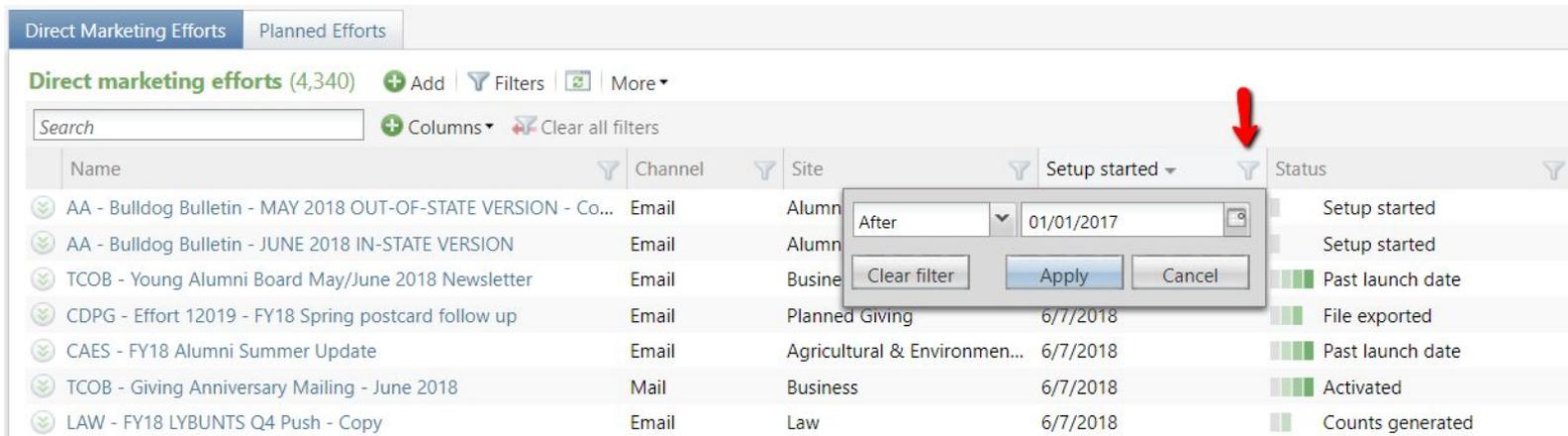
Name:	<input type="text"/>	Cost:	<input type="text"/>
Description:	<input type="text"/>	Category:	<input type="text"/>
Code:	<input type="text"/>	Site:	<input type="text"/>
Channel:	<input type="text"/>	<input type="checkbox"/> Match all criteria exactly	

# Q13

## What improvements can be made to marketing efforts?

**Response:** “Is there a way to archive old marketing efforts? I don't want to delete them, but I would love to archive them so only the most recent (past 1-2 years) show. I think it would help eliminate some of the clutter.”

**Answer:** Marketing Efforts should never be deleted. From the marketing efforts main page you can click the filter icon next to the setup started column header. Here you can decide the date range for viewing efforts. When you assign a filter to a column header it remains sticky (if you need to see older efforts in the future, you'll need to undo this setting.)



The screenshot shows the 'Direct Marketing Efforts' interface. At the top, there are tabs for 'Direct Marketing Efforts' and 'Planned Efforts'. Below the tabs, there is a search bar and a 'Direct marketing efforts (4,340)' header with options to 'Add', 'Filters', and 'More'. A 'Columns' dropdown and 'Clear all filters' button are also visible. The main table has columns for Name, Channel, Site, Setup started, and Status. A filter dialog box is open over the 'Setup started' column header, showing a date range filter set to 'After 01/01/2017'. The dialog box has 'Clear filter', 'Apply', and 'Cancel' buttons. A red arrow points to the filter icon in the 'Setup started' column header.

Name	Channel	Site	Setup started	Status
AA - Bulldog Bulletin - MAY 2018 OUT-OF-STATE VERSION - Co...	Email	Alumn		Setup started
AA - Bulldog Bulletin - JUNE 2018 IN-STATE VERSION	Email	Alumn		Setup started
TCOB - Young Alumni Board May/June 2018 Newsletter	Email	Busine		Past launch date
CDPG - Effort 12019 - FY18 Spring postcard follow up	Email	Planned Giving	6/7/2018	File exported
CAES - FY18 Alumni Summer Update	Email	Agricultural & Environmen...	6/7/2018	Past launch date
TCOB - Giving Anniversary Mailing - June 2018	Mail	Business	6/7/2018	Activated
LAW - FY18 LYBUNTS Q4 Push - Copy	Email	Law	6/7/2018	Counts generated

# Q14

## What improvements can be made to managing prospects?

**Response:** “Easier search capabilities/filters.”

**Answer:** If you’re having difficulty locating certain prospect information, please email [askit@uga.edu](mailto:askit@uga.edu) and let us know which specific search options and filters you would like to see improved upon.

**Response:** “When there is a deceased spouse, it isn't shown when you are looking at the living spouse's record. (It'd be great if that info was visible while looking at the living spouse's page.) Currently, one must click on the spouse's name to see if they're still living.”

**Answer:** When looking at the primary relationship tile on a constituent's record, the deceased spouse will be indicated by the word “deceased” at the end of their name. However, we may be able to move the word “deceased” to the beginning of their name for easier viewing. This will be a topic brought up at the next GAIL Steering Committee meeting to be voted on.

# Q14

## What improvements can be made to managing prospects?

**Response:** “Email/Text notifications for expired opportunities and pending/planned steps.”

**Answer:** A notification system like this would be a huge undertaking for the Advancement Services team. However, it is not impossible. Depending on how many fundraisers want this type of update, it can certainly be put on the table for discussion. We will bring this up at the next GAIL Steering Committee meeting for a vote. Keep tuning into Tips & Tricks for more updates.

**Response:** “An easy-to-find link to a fundraiser's "prospects of" group on the "Fundraiser" Tab or in one of its sub-tabs would be beneficial. “

**Answer:** Once you search and select your “Prospects of” group record, you can then add it to your Shortcuts so it will appear on the left navigation pane no matter which screen you’re on.

# Q14

## What improvements can be made to managing prospects?

**Response:** “I wish the opportunity fields showed up on the contact report template, so they could be edited as part of the conclusion of the visit.”

**Answer:** This enhancement idea has been brought to our customization team. We don't know yet if this will be a possibility, but we will keep our users updated.

**Response:** “See all the various plans/managers on a specific record.”

**Answer:** On a constituent's prospect tab, you can select the plans subtab to view all active plans and managers for the donor.

The screenshot shows a CRM interface with a top navigation bar containing tabs: Communications, Documentation and Interactions, Attributes, Memberships, Revenue, Vanguard Images, Region Codes, Smart Fields, History, Constituent Timeline, Prospect, and Education. The 'Prospect' tab is selected. Below the navigation bar, there are subtabs: Prospect Summary, Plans, Prospect Team, Planned Gifts, Funding Interests, Campaigns, Prospect Manager History, Opportunities, Assets, and Prospect Status Archives. The 'Plans' subtab is active. A table shows the following data:

Constituent	Plan type	Plan name	Start date	Date added	Sites
	Major Giving Plan	LIBS - GIK of Personal Collection	8/11/2016	8/11/2016	Libraries

Below the table, there are details for the selected plan:

- Plan name: LIBS - GIK of Personal Collection
- Site: Libraries
- Current stage: Solicitation
- Primary manager: [Red box]
- Secondary manager:
- Last step: 8/11/2016 with
- Next step: 8/1/2018 with Close Gift
- Create Opportunity

At the bottom, there is a summary row:

Major Giving Plan	LIBS - Estate Gift to Endow Hargre...	1/24/2018	1/24/2018	Libraries
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# Q14

## What improvements can be made to managing prospects?

**Response:** “A fix to the glitch that prevents GAIL users from re-adding former members of a "prospects of" group back into the group.”

**Answer:** Former members of “Prospects of” groups can be re-added to the group by clicking the drop down arrow next to the name of the former member and selecting reactivate.

The screenshot shows a CRM interface for managing group members. At the top, there are tabs for 'Members', 'Details', 'Contact', 'Relationships', 'Communications', 'Attributes', 'Documentation and Interactions', 'Memberships', 'Revenue', and 'Vanguard Images'. Below the tabs, there is a section for 'Group members (896)' with options to '+ Add', 'Filters', and 'More'. A filter bar includes checkboxes for 'Include previous members' (checked) and 'Include other/previous roles' (unchecked), along with a 'Limit by role:' dropdown and 'Apply' and 'Reset' buttons. Below this is a table with columns: Name, Top LAIT score, FY Recogniti..., Lifetime Rec..., City, State, Start date, and End date. A red arrow points to a dropdown arrow next to a member's name in the 'Name' column. Below the table, there are action buttons: 'Edit', 'Edit roles', 'Set to primary', and 'Reactivate'. A red arrow points to the 'Reactivate' button. Below the buttons, there is a summary section for the selected member, showing 'Active' status, 'Lookup ID:', 'Total giving: \$300.00', 'Active constituencies:', and 'Donor Prospect'.

Name	Top LAIT score	FY Recogniti...	Lifetime Rec...	City	State	Start date	End date
[Redacted]	9.25	\$0.00	\$330.00	[Redacted]	[Redacted]	7/28/2017	2/15/2018

Active  
Lookup ID:  
Total giving: \$300.00  
Active constituencies:  
Donor Prospect

# Q14

## What improvements can be made to managing prospects?

**Response:** “It could be simplified - there are too many pieces of information that have to be entered in different places.”

**Answer:** In March of this year, the Advancement Services team released a new tab on prospect plans called the *Plan Dashboard*. This tab combines editing plan steps, editing opportunities, and viewing other prospect info on the same screen.

The screenshot displays the 'Plan Dashboard' interface with the following sections:

- Plan Dashboard** (selected tab): Details, Opportunities, Solicitors and Participants, Documentation, Planned Gifts, Manager History.
- Next step and progress summary**: Objective: Close Gift, Owner: Pending, Status: Pending, Expected date: 8/1/2018, Progress: 1 completed, 1 pending, 1 planned.
- Opportunities (1)**: Table with columns: Status, Expected amount, Expected date, Likelihood, Ask amount, Ask date, Accepted amount, Response date, L.A.I.T. Score.
- Funding interests (0)**: Table with columns: Funding type, Level of interest, Comments, Sites.
- Plan narrative**: I plan to solicit for their personal collections. will deal with her life and radio show, philanthropic endeavors, etc.
- Plan Timeline**: A Gantt chart showing steps: Completed (2016-08-11), Pending (2018-08-01), and Planned (2018-08-01).

# Q14

## What improvements can be made to managing prospects?

**Response:** Being able to add a next step from the "contact report" screen more easily.

**Answer:** When you file a contact report, the ability to edit your next step will be located underneath the comments field.

The screenshot displays a CRM contact report form. The main form is titled 'Cultivation' and has a status of 'Pending'. It includes fields for Owner (West, Ms. Leslie Kirsten), Stage (Cultivation), Contact Method (Initial Meeting), and various time fields. Below these are sections for 'Additional solicitors' and 'Participants'. A 'Comment' field contains a list of items: LOCATION OF MEETING, PURPOSE, HIGHLIGHTS OF VISIT, PERSONAL DETAILS, and NEXT STEPS. A red arrow points to a green link labeled 'Next step in prospect plan' located below the comment field. Below this link is a section titled 'Edit next step information' which contains a sub-form with fields for Objective (Solicitation), Status (Planned), Owner (West, Ms. Leslie Kirsten), Expected date (8/9/2019), and Actual date (mm/dd/yyyy).

# Q14

## What improvements can be made to managing prospects?

**Response:** Definitions of meetings, interactions as a pop up on screen.

**Answer:** Both the Prospect Management guide and the GAIL resources website have a list of interaction contact methods and when they should be used. Both these posts can easily be bookmarked on your web browser for easy reference.

**Response:** Make it easier to put in interactions. Pre-populate some data etc.

**Answer:** Unfortunately GAIL has no way of knowing what day your interaction occurred or what type of interaction occurred. We could pre-populate the date to reflect the current date, however most interactions are not entered on the day they happen. We could also pre-populate the contact method, however this will be very inefficient for other GAIL users who don't use that type of method. The Advancement Services team would be happy to customize interactions for the purposes of streamlining if it would benefit a large amount of GAIL users.

# Q15

## What info would you like added to GAIL?

**Response:** “I wish there was a better way to identify emeritus status. I will typically look up the donor in GAIL, check the relationships tab and if it says they are a retired employee, then I look online to find out if the person has emeritus status or not. It would be wonderful if all of that information were in GAIL.”

**Answer:** Emeritus status is managed individually by each school/college. Most schools who keep track of their emeritus tag them with an attribute. Others may organize them with groups. If your unit does not currently tag your emeritus faculty in GAIL, and you want to begin this process, please email [askit@uga.edu](mailto:askit@uga.edu)

**Response:** “Correct information for Faculty and Staff has been difficult to find. Continued efforts to work with HR and have titles (many faculty with PhD are not listed as Dr.), education, spouse, and nickname information pulled from hiring files would be very helpful for us!!”

**Answer:** The Records team receives faculty/staff information from HR every February, June, and September. This information not only adds new employees to GAIL but it also updates the data of our current employees. Marital status is included in this upload, however we are not provided with the spouses’ names or confirmed educational history.

# Q15

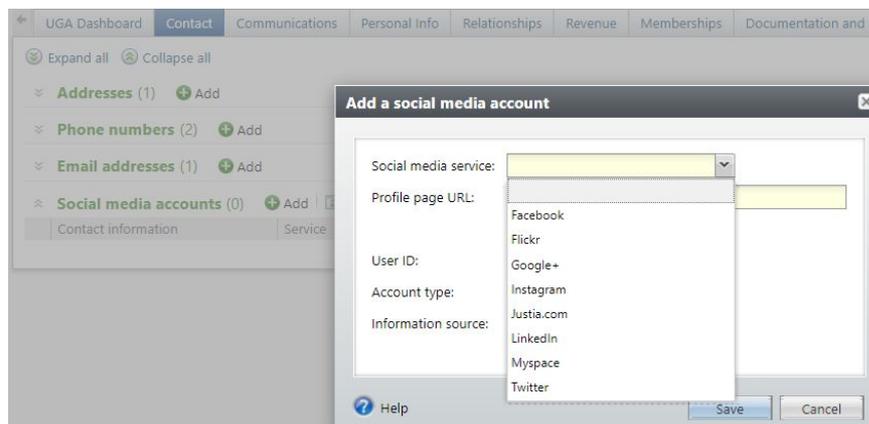
## What info would you like added to GAIL?

**Response:** “The ability to pull lists with contact information not tied to a DME would be helpful. For instance, I had an inquiry about the number of alumni we have who were football players. At the time, we had no plans to market to or communicate with them, just curious as to how many we had and who they were.”

**Answer:** The query team will gladly provide you a list (or count) of alumni who were football players. However, this type of list will not contain any form of contact information.

**Response:** “I'd like to be able to add Instagram accounts where you can also add Facebook or LinkedIn. I have found a few people by finding their Instagram.”

**Answer:** Instagram has recently been added as an option within the Social Media section of the Contact tab.



# Q15

## What info would you like added to GAIL?

**Response:** “Improved wealth information (if possible)”

**Answer:** If you need more additional wealth information beyond what is provided within the model scores page, please contact the Prospect Research team or submit a prospect research request.

**Reponse:** “Individual interests and communication preferences.”

**Answer:** Individuals interests can be found on the constituents’ record under the Personal Info tab, then the Personal subtab. Communication preferences are recorded on the Communications tab, then the Preferences subtab - these include solicit/contact preferences and there is a section for Mail Preferences, as well. If you have something you want to track but does not currently exist, please send an email to [askit@uga.edu](mailto:askit@uga.edu) to request a setup.

# Q15

## What info would you like added to GAIL?

**Response:** “I would like to see connections to centers that aren't necessarily academic but that faculty, staff, postdocs, and students are associated with.”

**Response:** “I'd love to know more specific information about alumni giving to outside organizations.”

**Response:** “Professional board and committees an individual serves on, separate from UGA.”

**Answer:** Constituents' involvement and giving outside of UGA can be found in several places including the documentations and interactions tab and the attributes tab. In response to the feedback of our users in this area of interest, the Advancement Services team will discuss the possibility of organizing this information in a way that is easier to locate for our users.

# Q15

## What info would you like added to GAIL?

**Response:** “Best way to add student organization participation (and leadership roles) so it can be used for future targeted alumni outreach.”

**Response:** “Graduation year. I have not looked for this, but the Program Director mentioned that it would be nice to have.”

**Response:** “Dual degrees, certificates, minors”

**Answer:** Student organization participation and leadership roles can be found and added on the education tab, within the involvement section, of a constituent’s record. The education tab also shows graduation years, dual degrees, certificates, and minors.

The screenshot shows a student record interface with several tabs: Summary, Personal Info, Contact, Education, Relationships, Communications, Attributes, Documentation and Interactions, and Vanguard Images. The Education tab is active, showing a table with 2 entries. The Involvement tab is also visible, showing a table with 3 entries. Red arrows point to the 'Class of' field in the Education table, the 'Degree' field in the Education table, and the 'Position' field in the Involvement table.

Educational institution	Class of	Status	Primary e...	Program	Degree
Univ. of Ga.	2012	Graduated	✓	Undergraduate	BBA-Bachelor of Business Administration
Univ. of Ga.	2012	Completed		Certificate	CERT-Certificate

Type	Name	Position	Start date	End date
Arts	Percussion Tenor Drum	Tenor Drum		
Redcoat Band	Member			
Study Abroad	Exchange Studies Abroad			

# Q15

## What info would you like added to GAIL?

**Response:** “More employment information - I do briefings and I wish Gail told me what their position is in the company.”

**Response:** “Can you see constituents employer information? I have not been able to locate this.”

**Answer:** Employment information can be found in the Relationships tab of the constituent’s record. Job titles are added by our GAIL users and the Records team when the information is discovered.

The screenshot displays the GAIL system interface. At the top, there are tabs for Summary, Personal Info, Contact, Education, Relationships, Communications, Attributes, and Documentation and Interactions. The Relationships tab is selected, and a red arrow points to it. Below the Relationships tab, there are sub-tabs: Relationships, Relationship Tree, Relationship Maps, and Group Member. The Relationships section shows a table with columns: Name, Constituent type, Type, and Relationship. Below this, there are sections for Individual and Organization. The Employment history section is highlighted with a red box and contains a table with columns: Name, Job title, Location, Job category, and Career level. The table lists one entry: Indivisible Project, Distributed Fundraising Associate, Washington, DC.

Name	Job title	Location	Job category	Career level
Indivisible Project	Distributed Fundraising Associate	Washington, DC		

# Q15

## What info would you like added to GAIL?

**Response:** “How often each person's profile has been updated.”

**Answer:** You can view previous updates made to a constituent’s profile by choosing the history tab and choosing criteria, then clicking *view report*.

Field type: All User: [ ]  
Show: Last 30 days Action: All  
Start date: 5/5/2018 End date: 6/5/2018

View report

### Constituent History Report

Date	User	Action	Field changed	Value before	Value after	Process	Application
6/5/2018 1:20:45 PM	MYID\kwest	Add	Relationship:CONTACTTYPECODEID	n/a		Application	Blackbaud App Server (WebShell)
	MYID\kwest	Add	Relationship:ENDDATE	n/a		Application	Blackbaud App Server (WebShell)

# Q17

## What info is difficult to update?

**Response:** Relationships - Employee/Employer

**Answer:** Users can add this information from the constituent's relationships tab, click add organization and then search for the employer. Establish who is the employee and save.

The screenshot displays a CRM interface with a top navigation bar containing tabs: Summary, Personal Info, Contact, Relationships, Education, Communications, Attributes, and Documentation and Interactions. Below this is a sub-navigation bar with: Relationships, Relationship Tree, Relationship Maps, and Group Member. A red arrow points to the 'Add organization' button in the 'Relationships (9)' section. The 'Add a relationship' dialog box is open, showing the 'Relationship information' tab. It includes a search field for 'Related organization' with 'Disney Media Networks' entered. Below, two dropdown menus are highlighted with red boxes: 'Potter, Mr. Harry James is the:' set to 'Employee' and 'Disney Media Networks is the:' set to 'Employer'. The dialog also features 'Start date' and 'End date' fields, 'Recognition credits' options, and a 'Comments' section. Buttons for 'Save' and 'Cancel' are at the bottom right.

# Q17

## What info is difficult to update?

**Response:** Deceased

**Answer:** Marking a constituent as “deceased” is a simple two-step process. Click “mark deceased” on the personal info tab, enter today’s date and your source. Then save!

**Response:** I always worry that I will mess something up or do something wrong, so I’d rather send it to records and have them do it.

**Answer:** The Records team audits every change users make to a constituent’s profile. You never need to worry about “messing” something up. If Records identifies an error, they will resolve it and/or reach out to you for clarification.

The screenshot shows a web interface for managing constituent information. The top navigation bar includes tabs for 'Personal Info', 'Contact', 'Relationships', 'Education', and 'Communications'. Below this, there are sub-tabs for 'Personal', 'Constituencies', and 'Stewardship Recipients'. The 'Personal' sub-tab is active, showing options to 'Expand all' or 'Collapse all'. Under 'Personal information', there are fields for 'First name: Leslie', 'Middle name: Kirsten', and 'Last name: West'. To the right of these fields are buttons for 'Edit', 'Mark deceased', and 'Mark inactive'. A red arrow points to the 'Mark deceased' button. A dialog box titled 'Mark individual deceased' is open, containing a 'Deceased date' field with the value '6/4/2018', a 'Confirmation' dropdown menu set to 'Unconfirmed', and a 'Source' dropdown menu set to 'Family Update'. At the bottom of the dialog box are 'Help', 'Save', and 'Cancel' buttons. A red arrow points to the 'Save' button.

# Q17

## What info is difficult to update?

**Response:** “There are multiple fields where the same information has to be added in order for it to run correctly on reports, mailings, etc. A donor fussed at me because we sent something to the wrong address and it was all because one field had not been checked off in GAIL.

**Answer:** When GAIL processes mailings, it defaults to send to a constituent’s primary address. If a donor requests to have mail sent to a specific address, simply edit the address and check the box to set as primary.

**Response:** “GAIL often doesn't let me change which phone number is primary.”

**Answer:** Phone numbers can easily be changed to primary by choosing “set as primary” when editing.

### Phone information

Type:	<input type="text" value="Residence"/>	<input type="checkbox"/> Set as primary phone number
Number:	<input type="text" value="(706) 308-3679"/>	<input type="checkbox"/> Do not call this phone number
Country:	<input type="text"/>	Reason: <input type="text"/>
Call after:	<input type="text" value="hh:mm AM"/>	<input type="checkbox"/> This phone number is confidential
Call before:	<input type="text" value="hh:mm AM"/>	



# Q17

## What info is difficult to update?

**Response:** Household/Marriages/Divorces

**Answer:** Creating and separating a household in GAIL is certainly a multi-step process. If you are hesitant about making this change, or need some extra guidance, you can email [records@uga.edu](mailto:records@uga.edu) or use any of our instructional guides located on the Resources tab of the GAIL website.

**Response:** “Communications are challenging. I'm never sure when to add a communication, and the best way to do that.”

**Answer:** When processed through a marketing effort or event invitation, communications tags are automatically added to a constituent's profile on the communication tab.

**Response:** “Occasionally, changing the invalid email status when a new address is available.”

**Answer:** When an email address becomes invalid, the status should remain invalid. When a new email address is available, it should be added as a totally separate/new email address. The invalid email address should not be edited to be replaced with the new email address.

# Q17

## What info is difficult to update?

**Response:** Interactions are very time consuming due to having to manually input every highlighted section (date, school, type of interaction, etc) if there was a way to streamline this, it would be helpful.

**Answer:** Unfortunately GAIL has no way of knowing what day your interaction occurred or what type of interaction occurred. We could pre-populate the date to reflect the current date, however most interactions are not entered on the day they happen. We could also pre-populate the contact method, however this will be very inefficient for other GAIL users who don't use that type of method. The Advancement Services team would be happy to customize interactions for the purposes of streamlining if it would benefit a large amount of GAIL users.

Summary:	<input type="text"/>		
Status:	<input type="text" value="Pending"/>	Owner:	<input type="text" value="West , Ms. Leslie Kirsten"/>
Category:	<input type="text"/>	Contact method:	<input type="text"/>
Subcategory:	<input type="text"/>	Event:	<input type="text"/>
Expected date:	<input type="text" value="mm/dd/yyyy"/>	Actual date:	<input type="text" value="mm/dd/yyyy"/>
		Location:	<input type="text"/>

# Q18

## Any additional feedback?

**Your team is amazing! Thank you!**

You guys are doing a great job! Keep up the good work!

**Love how helpful y'all are!**

**Thank you and your team for always being there to answer questions!**

Your client services staff is always very helpful and very patient with me. I appreciate that.

I really appreciate the support of the GAIL training staff. They never fail to talk me through my challenges.

I am always so grateful for the GAIL team, after 30 years in the corporate world and always being told why something can't be done... y'all are truly focused on how something can be done. Hands-down the most customer-focused IT team I've ever worked with.

# Q18

## Any additional feedback?

**Response:** “Wish we could streamline to make things less time consuming.”

**Response:** “It's just not as user friendly as I would like it to be. It's incredibly powerful, but overwhelming and because there are so many things to click, it's easy to miss a step. Video tutorials are so helpful for me.”

**Answer:** The Advancement Services team is always working on new and creative ways to streamline processes and make tasks easier for our GAIL users. Our biggest challenge: how do we make such a powerful system, with so much information, as simple as possible for all of our 600+ users? Every user has different GAIL needs and different styles of learning. We try to implement system changes and instructional guides that benefit as many users as possible. If you have any specific ideas or suggestions for ways to streamline, we would love to hear about it! Please send ideas and requests for new video tutorials to [askit@uga.edu](mailto:askit@uga.edu)

# Q18

## Any additional feedback?

**Response:** In regard to Bee email editor: is there any way to enlarge the working space or preview space? It is unconducive to creating email content when the user cannot see a significant part of the email she is constructing.

**Answer:** You can easily bring more (or less) of your email into view by using the “ctrl -” or “ctrl +” shortcuts on your keyboard

**Response:** “Name format challenges need to be addressed.”

**Answer:** Name formats should only ever be changed at the request of the constituent. This is something we have began putting more emphasis on during training classes, workshops, and campus consultations. Our policy is to honor the wishes of the constituents in our database. That may not always match what is considered as ‘standard’ but the constituents wishes override our own individual preferences.

# Q18

## Any additional feedback?

**Reponse:** “It would be helpful if the ID number remained on all the pages.”

**Answer:** When navigating a constituent’s profile through the information tabs, the lookupid of the constituent will always remain at the top of the page.

**West , Ms. Leslie Kirsten**

**Individual**    **Lookup ID: 530185**

**Constituencies:** Fundraiser   Prospect   Event registrant   Staff

↓ Show more

← Personal Info   Contact   Relationships   Communications   Attributes   Documentation and Interactions   Memberships   Revenue

Personal   Constituencies   Stewardship Recipients

⊕ Expand all   ⊖ Collapse all

⌕ Personal information   ✎ Edit   🚫 Mark deceased   🚫 Mark inactive   📅

# Q18

## Any additional feedback?

**Response:** “Stop using automatic updates. The last time LinkedIn information was used they were linked to incorrect constituents. Likewise for alumnifinder and RuffaloCody updates.”

**Answer:** Out of all the biographical changes and updates that were made to GAIL last year, 73% of that information was added by the Records team from sources like LinkedIn, Alumnifinder, and RuffaloCody. Every time Records is provided batch information to upload into the system, they spend weeks combing through the information to look for errors, duplicates, etc. Occasionally a mis-match may occur. This is easily remedied by alerting the records team. If we were to stop using our sources to update records, 73% of the information in GAIL would either be missing or incorrect. This is a far more severe alternative than the occasional incorrect constituent linking.

# Q18

## Any additional feedback?

**Response:** “It would be helpful if a pop up box could explain terms (gift vs. pledge payment vs. pledge).”

**Answer:** On the GAIL website, under the Resources tab, there is a link to the GAIL Dictionary. In the Dictionary there is a chart of common revenue scenarios which explains the differences between outright gifts, pledge payments, and new pledges.

### Chart of Common Revenue Scenarios

(described in terms of transaction type and application area)

	Transaction Type	Application Area
New Outright Gift	Payment	Donation
New Pledge	Pledge	Donation
New Recurring Gift	Recurring Gift	Donation
New Planned Gift	Planned Gift	Donation
Payment on a Pledge	Payment	Pledge
Payment on a Recurring Gift	Payment	Recurring Gift
Payment on a Planned Gift	Payment	Planned Gift
Event Registration or Sponsorship	Payment	Event Registration
Non-Gift Payment	Payment	Other

# Q18

## Any additional feedback?

**Response:** “I’d like to have the revenue portion of GAIL improved. It’s difficult to see the history of a pledge from start to finish. Also, an easy way to see what the donor has given across UGA.”

**Answer:** On the revenue history tab of a constituent’s profile, you can use your search filters to show pledges and payments grouped by commitment. This will show the history of the pledge. Additionally, there is a “*Constituent Credit Total*” report that summarizes a constituents giving across UGA, this is found on the left navigation bar on any constituents record.

### Reports

- Constituent profile
- Constituent Credit Total
- Prospect Summary Briefing
- Top Campaign Strategy Profile

Date	Amount	Balance	Transaction	Application
7/31/2013	\$5,000.00	\$0.00	Pledge	Donation
7/31/2013	\$5,000.00		Payment	Pledge
1/19/2010	\$10,000.00	\$0.00	Pledge	Donation
12/16/2010	\$4,847.05		Payment	Pledge
12/21/2009	\$5,152.95		Payment	Pledge

# Q18

## Any additional feedback?

**Response:** “Maybe if there was a hybrid of emailing records and adding information directly to GAIL—for example, if I want to add information, I could upload it in a portal but it would be reviewed by records before it was added, to be sure it was appropriate/in the right place? But I think a lot of my fear just comes from the interface and how I feel like I’m going to break something if I don’t press the right tab/button.”

**Answer:** Every time constituent information is added or edited in GAIL, it is reviewed by the Records team to make sure that the data was added correctly. If there was a missed step or missing information, the Records team will correct the error and alert you via email.

**Response:** “Let users make simple address and phone number updates to alumni without having to take a training class.”

**Answer:** Training is always required for any level of access to GAIL. This is in order to ensure the correct entry of the various types of data - we are held responsible for the accuracy and integrity of the data in the GAIL system. If you want to be able to change an address in GAIL but don’t want to attend training, you can always email the updated information to [askit@uga.edu](mailto:askit@uga.edu) and the Records team will update the data on your behalf.

# Q18

## Any additional feedback?

**Response:** “It's just too complicated for a front-line fundraiser to keep up on everything. I'm doing the best that I can to keep up with the data entry plus all of the substantive metrics being placed on me, so being corrected (albeit with good intent) by Prospect Management on my data entry is disheartening.”

**Answer:** At any given time, fundraisers have 75+ prospects in their portfolio. We understand that this is a lot to keep up with which is why our Prospect Management team is such an invaluable resource. Their overall goal is to make sure that every fundraiser has the information and tools they need to easily manage their portfolio. If you feel that there is a specific management process you are struggling with, please do not hesitate to reach out to the Prospect Management team.

# Q18

## Any additional feedback?

**Response:** “Is there any way to include punctuation, i.e. hyphens - in the phone numbers? (for example, 706-542-1461 is much easier to read than 7065421461) thanks”

**Answer:** Most phone numbers within GAIL are listed with hyphens. However, there are some instances in which no punctuation exists. This is due to the number being converted from our previous Ascend system. We will look in to possible solutions for this formatting discrepancy.

**Response:** “I would like to see more reporting and data visualizations in GAIL, so we don't have to use multiple products.”

**Answer:** Within the last year, Advancement Services has created several custom visualizations in GAIL including the UGA Dashboard, Constituent Timeline and the Revenue Pivot Table. If you have more ideas for possible visualizations, please send them to [askit@uga.edu](mailto:askit@uga.edu). We would love to hear your suggestions!

# Q18

## Any additional feedback?

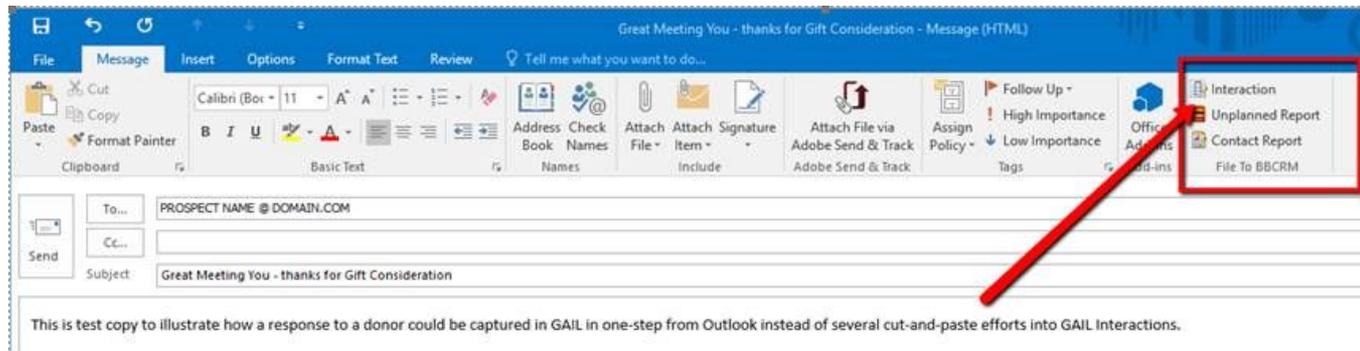
**Response:** “GAIL users have to have extensive back-end knowledge on how this interface works to be able to use it but users are limited in actions. Why make the user have so much knowledge of the inner workings of a program, and not give them full access. Either give users full capability--so GAIL employees don't have to constantly be the go-between--or make the interface more user-friendly in that users don't have to know definitions of technical terms or 10-step processes to complete a simple act of sending out an email. I believe this is in-part why employees choose third-party communication platforms like MailChimp.”

**Answer:** Giving users full access to GAIL would require extensive training that would far exceed a 10-step process or what is taught in any of the GAIL classes. If there are tasks you do not have access to, please let us know. As with any database system of this caliber, there will likely always be multi-step processes in order to ensure accuracy and integrity. The Client Services team works very hard to provide tools and guides to help our users get the most out of GAIL. While we are aware that Mailchimp’s simplicity may be appealing, it is extremely limited in it’s functionality as compared to GAIL.

# Q18

## Any additional feedback?

**Response:** “I would say the most difficult thing is adding plans, the way that you must enter interactions (it takes longer to add the interaction than it actually does to call someone or to email them). It'd be so wonderful if you could have that person's file open and click a radio button to signify if you'd sent an email.”



**Answer:** In June 2017, Advancement Services tested a new feature that would link a fundraiser’s Outlook directly to GAIL for an easier interaction entry. However, we received little to no feedback from our users, so we ultimately decided not to pursue this avenue. If you have any new ideas as to how we could make something like this work, we would love to hear from you!

# Q18

## Any additional feedback?

**Response:** “I wish there were a way to ensure the information in GAIL has been vetted. For example, someone added "Order of the Coif" to a Regent's education profile because (I assume) they saw it listed online somewhere, but the Regent was not, in fact, a member of the Order of the Coif. When I contacted the national office of the organization to verify, they said he had never been a member.”

**Answer:** The Alumni Records team conducts nightly audits and reviews of every biographical change that is made to a constituent's record. This review looks at who is adding information, how much information is being added, and if the information was added correctly. However, due to all the other biographical changes Records has to manage with their small team, they have limited time to research and verify every educational involvement that a user adds to GAIL. When GAIL users do add an involvement, it is presumed that the information came from a reliable source and we trust that our users are doing their best to add accurate data. The Order of the Coif is a law school involvement, so it was likely added by a law school staff member or student worker. If something was added incorrectly or on the wrong constituent, the Records team should be alerted so it can be resolved.