



2016



UNIVERSITY OF ILLINOIS

SOCIAL MEDIA CONFERENCE

#ILLINOISsmc



Agenda

- Who's (What's) TED?
- What I Want | MGO Perspective
- What I Want | Marketer Perspective
- What's Possible Today
- What's Coming in the Future
- What You Can Do
- Questions





Who's (What's) TED?

- University's advancement database
- Blackbaud CRM
- Web-based platform
- Replaced FACTS in Fall 2015





Who's (What's) TED?

- Tracking donor history and interactions with advancement staff
- Generating marketing segmentation and campaigns
- Tracking of educational involvement
- Events management
- Tracking other engagement, like committees or volunteerism
- Storing constituent interests and opt-ins / opt-outs
- Membership management
- Reporting and performance measurement





What I Want (MGO Perspective):

- Leads
- Engaged prospects
- Ways to connect with prospects
- Ways to build rapport





What I Want (Marketer perspective):

- Story leads
- Targeted list development
- Tracking of brand ambassadors and social influencers





What's Possible Today

- Marketing efforts
- Opt-ins / opt-outs
- Affiliations
- Interests
- Social media accounts
- Organizational hierarchies
- High executive titles





What's Possible Today | Marketing Efforts

| Contact Personal Info Relationships Prospect Affiliations Revenue Memberships Documentation and Interactions Communications History Attributes Smart Fields Security Region Codes | | | | | | |
|---|--|---------------------|---------------|---------------------------------------|-----------------------|--|
| Communications Appeals ✉ Emails Preferences Newsletters | | | | | | |
| Emails (32) Filters More | | | | | | |
| <input type="text" value="Search"/> Columns Save list Open list Clear all filters | | | | | | |
| Appeal | Marketing Effort | Response Date | Response Type | Email Name | Email Subject | |
| UIAA UIAA FY 2016 | | | | | | |
| UIAA UIAA FY 2016 | A-16-EN079343A @Illinois ENews May 2016 | 2016-06-11T10:13:53 | Opened | @Illinois Alumni Newsletter May 2... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN079343A @Illinois ENews May 2016 | 2016-05-26T14:16:08 | Clicked | @Illinois Alumni Newsletter May 2... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN079343A @Illinois ENews May 2016 | 2016-05-26T14:15:52 | Opened | @Illinois Alumni Newsletter May 2... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN079343A @Illinois ENews May 2016 | 2016-05-18T11:56:23 | Sent | @Illinois Alumni Newsletter May 2... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN077392B-UIAA UIECU March UIUC pm | 2016-03-10T10:48:00 | Sent | 2016_March UIECU Illinois | Hurry! Last Chance | |
| UIAA UIAA FY 2016 | A-16-EN078303A @Illinois ENews April 2016 | 2016-04-20T09:10:16 | Sent | @Illinois Alumni Newsletter April ... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN080490A @Illinois ENews June 2016 | 2016-06-22T09:48:14 | Sent | @Illinois Alumni Newsletter June ... | Alumnus makes spa | |
| UIAA UIAA FY 2016 | A-16-EN077586A - UIAA Welcome Center Email | 2016-03-15T14:59:00 | Sent | 2016_March Welcome Center Email | Help build the U of I | |
| UIAA UIAA FY 2016 | A-16-EN078303A @Illinois ENews April 2016 | 2016-04-21T03:10:57 | Opened | @Illinois Alumni Newsletter April ... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN077491A @Illinois ENews March 2016 | 2016-03-23T09:05:00 | Sent | @Illinois Alumni Newsletter Marc... | Illinois Alumni New | |
| UIAA UIAA FY 2016 | A-16-EN076425A @Illinois ENews February 2016 | 2016-02-17T09:05:00 | Sent | @Illinois Alumni Newsletter Febru... | Illinois Alumni New | |
| UIUC ENG FY 2016 | | | | | | |
| UIUC ENG FY 2016 | U-16-EN074950D UIUC ENG eNewsletter WO | 2016-04-12T16:16:00 | Sent | WO 74950D News from Engineerin... | News from Enginee | |
| UIUC ACES FY 2016 | | | | | | |
| UIUC ACES FY 2016 | U-16-EN078074B UIUC ACES WO - Monthly Newsletter | 2016-06-14T22:08:29 | Sent | UACE78074B (WO78074B) - June 2... | June 2016 ACES EA | |
| UIUC ACES FY 2016 | U-16-EI078073B UIUC ACES WO - Family Academies | 2016-04-21T16:19:10 | Sent | UACE78073B (WO78073B) - Regist... | Register Now for AC | |
| UIUC ACES FY 2016 | U-16-EN076943A UIUC ACES Spring Email | 2016-03-28T16:25:00 | Sent | 76943 Spring ACES@Illinois now a... | Spring ACES@Illinoi | |
| UIUC ACES FY 2016 | U-16-EN077743 UIUC ACES WO - Pay It Forward | 2016-04-01T11:07:00 | Sent | UACE77743 Get Ready for I Pay It F... | Get Ready for I Pay I | |





What's Possible Today | Marketing Efforts


UIAA UIAA FY 2016 A-16-EN079343A @Illinois ENews May 2016 2016-05-26T14:16:08 Clicked @Illinois Alumni Newsletter May 2... Illinois Alumni New

Finder Number: 179,002,621
Mail ID: 97,253
Email Name: @Illinois Alumni Newsletter May 2016
Source Code: 9AM63716EN079343AE0000000
Subject: Illinois Alumni Newsletter May 2016
Email Address: [REDACTED]@gmail.com
Date Sent: 1/1/1900
Solicit Code:
Link Category:
Link URL: <http://illinois.edu/emailer/newsletter/97253.html>
Bounced: No
Bounced Date:





What's Possible Today | Opt-ins / Opt-Outs

 **Ms. Kathryn L. Blum**

Individual **Lookup ID: 10745092**

Constituencies: Faculty/Staff Leadership Annual Gift Prospect UI Involvement Graduate Donor Advancement Staff Prospect Event registrant Volunteer

[↓ Show more](#)

[←](#) [Contact](#) [Personal Info](#) [Relationships](#) [Prospect](#) [Affiliations](#) [Revenue](#) [Fundraiser](#) [Memberships](#) [Documentation and Interactions](#) **Communications**

[Communications](#) [Appeals](#) [Emails](#) **Preferences** [Newsletters](#)

Solicit codes (0) [+ Add](#) [More ▾](#)


Sites: Show expired codes for [Apply](#) [Reset](#)

| Code | Site | Custom site | Start date | End date | Comments | Added by | Last changed by | Entry d |
|---|--------------------------------|-------------|------------|----------|----------|-----------------|------------------|-------------|
| Mail preferences (2) + Add + Set all mail types Filters More ▾ | | | | | | | | |
| Mail type | Details | | | | Send | Delivery method | Selected address | Send to sea |
| <input checked="" type="checkbox"/> General Correspondence | @Illinois E-News (Constituent) | | | | Yes | Mail | Primary Address | Yes |
| <input checked="" type="checkbox"/> General Correspondence | C SPH Newsletter Recip. (Unit) | | | | Yes | Mail | Primary Address | Yes |





What's Possible Today | Opt-ins / Opt-Outs

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[Communications](#) [Appeals](#) [Emails](#) **[Preferences](#)** [Newsletters](#)

Solicit codes (0) [+ Add](#) [More](#)

Sites: Show expired codes for [Apply](#) [Reset](#)

| Code | Site | Custom site | Start date | End date | Comments | Added by | Last changed by | Entry date |
|---|-------------------------------------|-------------|------------|----------|----------|-----------------|------------------|------------------|
| Mail preferences (3) + Add + Set all mail types Filters More | | | | | | | | |
| Mail type | Details | | | | Send | Delivery method | Selected address | Send to seasonal |
| <input checked="" type="checkbox"/> General Correspondence | @Illinois E-News (Constituent) | | | | Yes | Mail | Primary Address | Yes |
| <input checked="" type="checkbox"/> General Correspondence | C SPH Newsletter Recip. (Unit) | | | | Yes | Mail | Primary Address | Yes |
| <input checked="" type="checkbox"/> General Correspondence | U VMED Social Ambassador (Facebook) | | | | Yes | Mail | Primary Address | Yes |





What's Possible Today | Affiliations

 **Ms. Kathryn L. Blum**

Individual Lookup ID: **10745092**

Constituencies: Faculty/Staff Leadership Annual Gift Prospect UI Involvement Graduate Donor Advancement Staff Prospect Event registrant Volunteer

[Show more](#)

← [Contact](#) [Personal Info](#) [Relationships](#) [Prospect](#) **[Affiliations](#)** [Revenue](#) [Fundraiser](#) [Memberships](#) [Documentation and Interactions](#) [Communications](#) [History](#) [Attributes](#) [Smart Fields](#) [Security](#) [Region Codes](#) [Updates](#)


Affiliations By Advancement Unit (7)  [More](#) ▾

| Advancement Unit Code | Advancement Unit Description | Rank | Total Score | Degree | Employment | Volunteer | Giving | Event Attendee |
|-----------------------|---|------|-------------|--------|------------|-----------|--------|----------------|
| U BUSN | Business | 1 | 4031 | 500 | 0 | 600 | 2206 | 725 |
| U DIA | Division of Intercollegiate Athletics | 2 | 500 | 0 | 0 | 0 | 500 | 0 |
| F UIF | Foundation | 3 | 350 | 0 | 100 | 0 | 0 | 250 |
| U FAA | Fine and Applied Arts | 4 | 100 | 0 | 0 | 0 | 100 | 0 |
| U OTHR | Other Campus Units | 5 | 54 | 0 | 0 | 0 | 54 | 0 |
| U ACES | Agricultural, Consumer, and Environmenta... | 6 | 25 | 0 | 0 | 0 | 25 | 0 |
| U VCIA | Vice Chancellor for Institutional Advancem... | 7 | 21 | 0 | 0 | 0 | 21 | 0 |





What's Possible Today | Interests

 **Ms. Kathryn L. Blum**

Individual **Lookup ID: 10745092**

Constituencies: Faculty/Staff Leadership Annual Gift Prospect UI Involvement Graduate Donor Advancement Staff Prosp

↓ Show more

← Contact **Personal Info** Relationships Prospect Affiliations Revenue Fundraiser Memberships Docu

Constituencies Personal Help

⌵ Expand all ⌶ Collapse all

⌵ **Personal information** ✎ Edit ✎ Bio Feedback Edit ⚠ Mark deceased ⚠ Mark inactive

⌵ **Name formats** (12) ➕ Add ➕ Bio Feedback Add

⌵ **Aliases** (3) ➕ Add ➕ Bio Feedback Add

⌵ **Demographics** ✎ Edit ✎ Bio Feedback Edit

Standard Occupational Classification (0) ➕ Add ⚙ Filters 📄 More ▾

| Code | Description | Specialty | Start date |
|------|-------------|-----------|------------|
| | | | |

⌵ **Alternate lookup IDs** (7) ➕ Add ➕ Bio Feedback Add

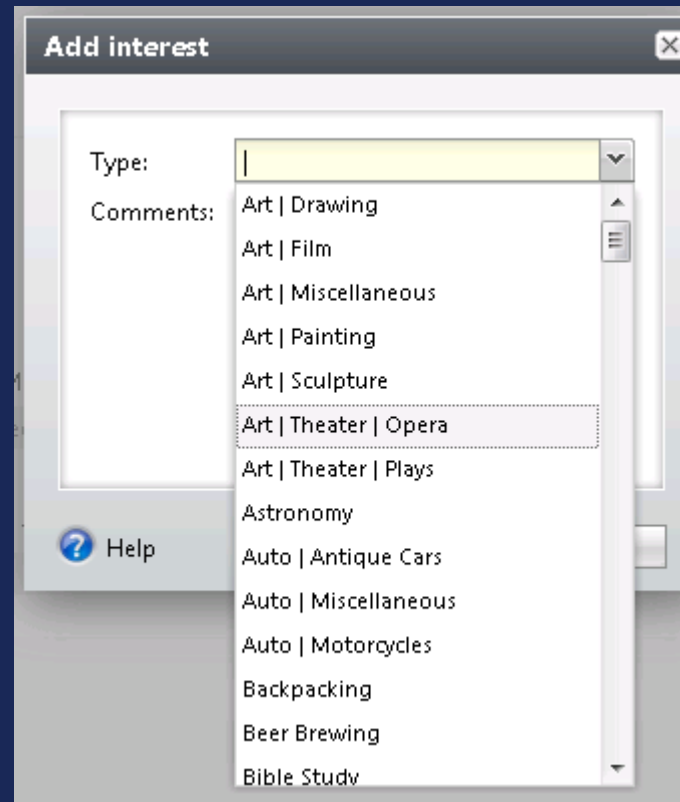
⌶ **Interests** (2) ➕ Add 📄 More ▾

| Type | Comments |
|---------------------|----------|
| ⌵ Horseback Riding | |
| ⌵ Sports Football | |






What's Possible Today | Interests





What's Possible Today | Social Accounts

 **Ms. Kathryn L. Blum**

Individual **Lookup ID: 10745092**

Constituencies: Faculty/Staff Leadership Annual Gift Prospect UI Involvement Graduate Donor Advancement Staff Prospect Event registrant V

↓ Show more


← **Contact** Personal Info Relationships Prospect Affiliations Revenue Fundraiser Memberships Documentation and Interacti

⌵ Expand all ⌶ Collapse all

⌵ **Addresses** (5) + Add + Bio Feedback Add

⌵ **Phone numbers** (4) + Add + Bio Feedback Add

⌵ **Email addresses** (5) + Add + Bio Feedback Add

Social Media (2) + Add  More ▾

| Contact information | Service | Type | Do not contact |
|---------------------|----------|----------|----------------|
| ⌵ @KathrynLBlum | Twitter | Twitter | |
| ⌵ katieblum | LinkedIn | LinkedIn | |





What's Possible Today | Org Hierarchies

Caterpillar Inc.

Organization Lookup ID: **10017700**

Constituencies: Corp / Business Managed Prospect Opt Outs on Record UI Involvement Donor Major donor Prospect Event registrant

↓ Show more

← Affiliations Revenue Memberships Documentation and Interactions Communications History Attributes Smart Fields Security Region Codes Updates Comments Documents Events

Parameters 2

Show: ▾

Show historical organizations


Corporate structure (33) [Go to](#) ▾ [Edit selections](#) ▾

| Organization name | Organization giving amount | Employee giving amount | Employee constituents | Primary contact |
|---|----------------------------|------------------------|-----------------------|-----------------|
| ▲ Caterpillar Inc. | | | 807 | |
| Caterpillar Inc. | | | 48 | |
| Progress Rail Services Corporation | | | 0 | |
| Caterpillar, Inc. | | | 124 | |
| Caterpillar Visitor Center | | | 0 | |
| Electro-Motive Diesel, Inc. | | | 47 | |
| Bucyrus International, Inc. | | | 1 | |
| Anchor Coupling | | | 1 | |
| Perkins Engines Inc. | | | 1 | |
| Progress Rail Services | | | 1 | |
| Solar Turbines Incorporated | | | 8 | |
| Caterpillar, Inc. | | | 140 | |
| Caterpillar | | | 58 | |
| Caterpillar, Inc. | | | 88 | |
| Advanced Technology Services | | | 2 | |
| Caterpillar, Inc. | | | 523 | |
| Caterpillar Inc. | | | 6 | |
| Caterpillar, Inc. | | | 63 | |
| Caterpillar, Inc. | | | 51 | |
| Caterpillar Inc. Earthmoving Machine Division | | | 0 | |
| Caterpillar Inc. | | | 75 | |





What's Possible Today | High Exec Titles

 **Ms. Kathryn L. Blum**

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Constituencies: Faculty/Staff Leadership Annual Gift Prospect UI Involvement Graduate Donor Advancement Staff Prospect Event registrant Volunteer

↓ Show more

← Contact Personal Info **Relationships** Prospect Affiliations Revenue Fundraiser Memberships Documentation and Interactions Communications History Attributes Smart Fields

Relationships Relationship Tree Relationship Maps Committees Fund Purpose Stewardship Group Member Extended Relationships

Relationships (2) + Add individual + Add organization + Add group/household + Bio Feedback Add | Filters | More ▾

Only display current relationships | Apply | Reset

Search | + Columns ▾ | Save list | Open list | Clear all filters

| Name | Constituent type | Type | Relationship type | Job title ▲ | Start date |
|-----------------------------------|------------------|---------|-------------------|---|------------|
| University Of Illinois Foundation | Organization | Contact | Employer | Assistant Vice President for Strategic Innovation | 11/12/2011 |
| ABC Industries | Organization | Contact | Employer | Chairman & CEO | 4/1/2010 |

Employment history (3) + Add | Filters | More ▾

Include inactive | Apply | Reset

| Name ▲ | Job title | Job category | Career level |
|-----------------------------------|---|--------------------------|--------------|
| ABC Industries | Chairman & CEO | 11-1010 Chief Executives | Executive |
| University Of Illinois Foundation | Senior Director of Campaign Planning and Strategic Management Ui Foundation Administrator | | |
| University Of Illinois Foundation | Assistant Vice President for Strategic Innovation | | |





What's Coming in the Future

- VetMed Pilot Project
 - Through March 31, 2017





Vet Med Social Media Pilot in TED

- ID brand ambassadors & influencers
 - Include their social media addresses
- Followers / fans
 - Document useful comments / responses / posts





Vet Med Social Media Pilot in TED

- Business processes
- Budget requirements
- Time commitments
- Best practices
- Definitions





What You Can Do | Tracking

- Track ambassadors for YOUR brand
- Track influencers
- Add rich data to TED
 - Plant questions
 - Comments





What You Can Do | In the Office

- Build relationships with your advancement team, and share:
 - information about brand ambassadors and influencers
 - high profile or high title followers





Questions?

