



UCINNOVATION

Take Your Advancement To The Next Level

The only comprehensive Advancement solution, native on Salesforce, to pass Security Review and certified HEDA compatible.



ascend

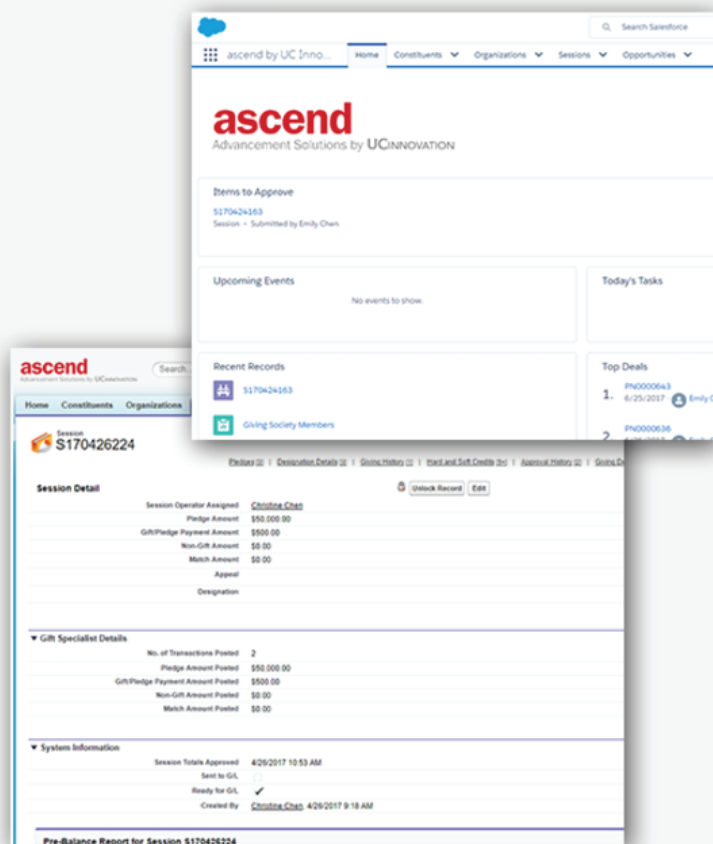
Advancement Solutions by UCINNOVATION

"USC is pleased to be the first University of its size to implement a solution on Salesforce for all of its advancement activities, including gift processing. Partnering with UC Innovation was critical in this achievement - they know the advancement environment, met our deadlines, and most importantly built a solution that has exceeded our expectations."

Tracey Vranich,
Vice President for Advancement Services, University Advancement,
University of Southern California

Benefits

- ✓ **Simplify and consolidate** disparate systems by migrating your entire Advancement operation.
- ✓ **Build stronger relationships** with your constituents as ascend gives you a broader, centralized view of the progress and effectiveness of Advancement activities.
- ✓ **Start fundraising sooner** as ascend has the most comprehensive, out-of-box features for Advancement.
- ✓ **Save money** since there's no need to build a custom solution or experiment with unproven, out-of-the box solutions.
- ✓ **No surprises** as our certified domain experts will provide you a realistic timeframe and budget for going live.



Features



Processing a gift
of multiple types - outright,
directed, charitable



Tracking multiple relationships
• Constituent-Org
• Constituent-Constituent
• Constituent-Household



**Processing a pledge
of multiple types**
major, annual, athletics, payroll, grant



**Tracking designations
& allocations**
easily adjustable - set up multiple
designations



Processing pledge payments
easily adjustable - set up installments with
different dates, amounts etc.



Easily track down summary of
• gifts
• pledges
• pledge payments
• constituent-org-household



Processing matching gifts
automatically create matching gifts from
companies that have matching gift set up
with their employees; 3rd party matching



**Implementing with different
interfaces**
ability to enter gifts in bulk, dealing w/
multiple interfaces



Entering hard/soft credits
automatically set up according to
gift type, spousal relationships,
company matching, etc



**Various features for
Prospect Management**
contact reports, tasks, strategies, wealth
reports etc. make it easy for a development
officer to solicit a prospect

ascend Product Modules

Our discovery and gap analysis work will uncover which modules you will need and how much custom development will be required.

- ✓ **ascend** Bio-Demo
- ✓ **ascend** Prospect Management
- ✓ **ascend** Gift Management
- ✓ **ascend** Mobile
- ✓ **ascend** Alumni Portal
- ✓ **ascend** AI Integration



ascend Modules

Key Features

Key Benefits

Bio-Demo

- Track multiple address, email, phone including history
- Store, track Constituents & Organizations in one place
- Tie Constituents to Corporations & Organizations
- Relate and track Constituents with other Constituents
- Summarize Constituent, Household, Organizations Giving History - First, largest, most recent gift, pledge, and pledge payment
- Supports house-holding of Constituents
- Track multiple Constituent type per Constituents
- Track Constituent degree history

Ability to use former address for matching Constituent

Easily see Constituent relationship to Organizations and Other Constituents

Easily see Donor's contribution to the school

Easily identify Parent, Alumni, Faculty constituents

Prospect Management

- Support prospect management activities against an individual, household or corporation
- Store wealth engine ratings from Wealth Engine
- Captures Strategies, Research and Contact reports

Easily see prospect management in one-centralized area

Gift Management

- Pledge, Gift and Pledge Payment Entry
- Adjustment of Pledge Payment to Gift and vice-versa
- Auto-creates Matching Gift for Organization's employees
- Provides the ability to process matching and directed gifts
- Allows for changing designation, appeal code/campaign
- Adjust transactions to different donors
- Supports batch processing of gift transactions from Payroll, Lockbox, Credit Card Companies
- Configurable workflow to manage approval for Gift Processing
- Pre-built daily integration job to receive designations & allocations from financial system and send gifts processed and approved
- Pre-built integration to Payroll and Student Systems

Complete gift management solution

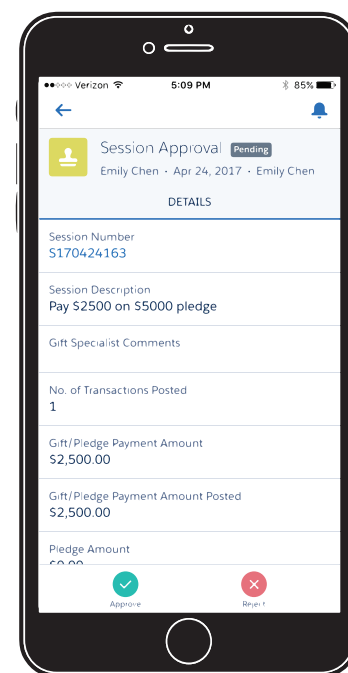
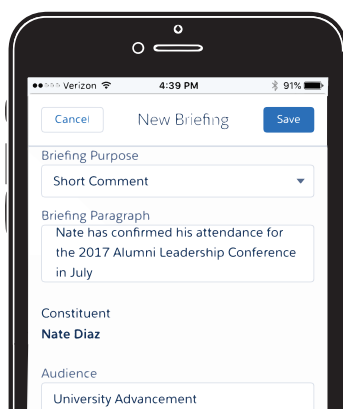
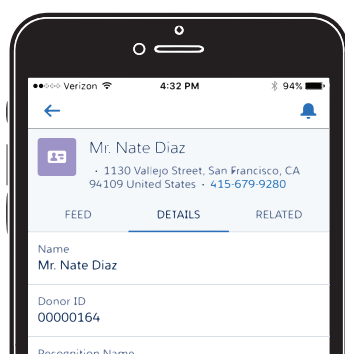
General

- Lightning Enabled
- Follows Higher Education Data Architecture (HEDA) and Non-Profit Starter Pack (NPSP)

Availability for site license

Mobile Friendly User Interface

Intuitive and Easy access to data that fundraisers need to connect with the right donors and prospects.



FAQs

Answers

How does ascend compare to other well-known CRM systems that support University Advancement? (i.e. Blackbaud CRM, Ellucian Advance)

These other CRM systems also offer a full feature set for Advancement activities. However, key advantages of ascend on Salesforce are the flexibility for customization and the many modules (i.e. Community, Sales/Marketing Clouds) that can be leveraged to support changing Advancement objectives. Salesforce is also configurable to co-exist with in-house systems.

What part of ascend has been innovated/expanded on existing Salesforce platform functionality?

Our ascend app is almost entirely custom, while leveraging a few standard Salesforce objects like Contacts, Accounts, and Opportunities to match Higher Ed Advancement processes.

What's the difference between Salesforce Classic vs. Lightning? Why is Salesforce trying to push forth with Lightning?

Classic is the old UI and Lightning is the new UI that Salesforce is endorsing (although it still has a few limitations that should be addressed in future versions). Lightning is more focused on reusable components and modularization. It is sleeker and more open to new features (i.e. mobile app enhancements).

What interfaces are supported with ascend?

Gift Processing interfaces include: General Ledger, Lockbox, Credit Card Processing, Payroll Deduction.

Bio interfaces include: Payroll, Student Information System.

Are reports pre-built in ascend?

Yes, ascend includes a minimum of 50 pre-built reports based on each school's requirements.

Besides Bio-Demo, Prospect Management, Gift Management, Mobile, Alumni Portal, and AI Integration, what other modules are on the ascend roadmap?

Events, Volunteer Management

Enhancements

Once the base functionality for ascend is delivered, you can choose the incremental requirements to fully optimize your Advancement solution.

- ✓ Integration Tools
- ✓ Custom Development
- ✓ Custom Reporting
- ✓ Platinum Support

About UC Innovation

Founded in 2011, we are a CRM Solutions & Services company committed to earning the trust of our Higher Education, Financial Services, and Consumer Products clients.

We are obsessed about delivering solutions on time and on budget, finding that optimal blend of innovative products and deep domain expertise.