UCI ZOTFORCE PROJECT

Application for Larry L. Sautter Award for Innovation in Information Technology - 2021

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ZOTFORCE PROJECT TEAM

ZotForce Executive Sponsor

Brian T. Hervey, CGPP, CFRE
Vice Chancellor, University Advancement and Alumni Relations;
President, UCI Foundation

ZotForce Implementation Team

Ashish Regmi - Executive Director, Digital Transformation and Innovation Team

Phani Alluri	Salesforce Solutions Engineer	**Daniela Brenner**	Senior Data Analyst
Osvaldo Gomez	Salesforce Solutions Architect	**Tom Gurbach**	Junior Salesforce Administrator
Jill Lake	Senior Data and Training Analyst	**Prasad Kothamasu**	Director, Salesforce and Mulesoft Architecture and Administration
Minh–tu Phan	Data Systems Analyst	**Stacy Shipman**	Data Quality and Training Analyst
Felipe Vasquez	Senior Manager Data Systems, Reporting and Analysis	**Edward Waribu**	Web Salesforce Communities Developer
Dingying Wei	Senior Application Developer		

ZOTFORCE PROJECT OVERVIEW

UCI has advancement and alumni relations staff in 23 different schools and academic units across the university to support and engage its alumni and donors. In order to enable UCI to conduct 21st century fundraising and engagement as part of UCI's Brilliant Future Campaign, Digital Transformation and Innovation team in advancement needed to to rethink its technological infrastructure, which was starting to show its age after 2 decades of accumulating legacy applications and home-grown solutions that were loosely integrated at best. UCI embarked on a journey of total transformation of its advancement and alumni relations processes by implementing highly integrated and innovative advancement and constituent engagement solution based on core Salesforce products named as ZotForce. ZotForce Project involved extensive collaboration with more than 300 staff spread across all schools/units in UCI involved in donor and alumni engagement. The resulting solution has enabled University Advancement to successfully respond to its growing/changing engagement, communication, informational and analytical needs. UCI has harnessed transformative power of Salesforce to improve the efficiency of its fundraising efforts; increase the effectiveness of its communication; increase the quality of services provided to internal and external constituents; obtain substantial business process efficiencies; and significantly improve the speed of information delivery. ZotForce is arguably the nation's best and most comprehensive implementation of Salesforce solutions in advancement and alumni arena elevating UCI's standing among its peers. The success of ZotForce has resulted in substantial interest among business users outside of advancement to extend the usage of the platform to engage other external stakeholders. The possible expansion of ZotForce capabilities include addressing the marketing and communication application needs across campus and engagement of organizations/companies in business development and applied innovation arena.

ZOTFORCE SUCCESS HIGHLIGHTS

- UCI has gained 360 degree integrated view of alumni, donors, and prospects and their engagement across schools, programs, events, and fundraising campaigns enabling fundraisers to take timely and appropriate actions to increase the flow of engagement and fundraising opportunities.
- More than 80% of ZotForce users actively login and utilize the system on a regular basis. Robust web and mobile based access to constituent data has enabled Advancement and Alumni relations teams across UCI to continue to work efficiently even during COVID-19 lockdown and work-from-home environment.
- ZotForce has allowed UCI to leverage API integrations with all online giving sources such as payment gateways, giving forms etc. to process large volumes of gifts in days rather than weeks and eliminated all paper gift documentations for online transactions. We are currently able to load, match and batch tens of thousands of gifts in a matter of few hours for gift processing enabling UCI to scale its fundraising operations.
- ZotForce has integrated Grateful Patient data from UCI healthcare system on a daily basis so that it can be utilized by Health Development Officers seamlessly for meaningful philanthropic engagement in a unified system. Previously Health Development Officers were utilizing excel based solutions and the load time for patient data was in days rather than hours.
- ZotForce is capable of automatically loading registration and attendance data from events platforms to drive event marketing emails, saving days of load time and furthering cultivation of donors replacing the manual data download and upload process for hundreds of alumni and donor events.
- The Chancellor, the Deans and the Development Officers all have easy and convenient access to platform integrated analytics, insights and dashboards at their fingertips helping them track Brilliant Future campaign performance as well as provide comprehensive view of fundraisers performance across schools/units.

ZOTFORCE SOLUTIONS & TECHNOLOGIES

ZotForce project replaced all legacy applications and implemented multiple applications on Salesforce platform to enable University Advancement & Alumni Relations at UCI to obtain the following business functionalities.

- **Cloud-based Application Platform:** Transition from legacy applications to establish a cloud-based application platform on which all UA applications will run. *(Salesforce Platform)*
- **Advancement & Constituent Management:** Provide advancement & constituent management functionalities with significant business workflow integration including gift processing & prospect management. *(Sales Cloud & AffinaQuest Advancement Solution)*
- **Marketing Automation:** Provide Email, Mobile and Social Media Marketing functionalities with extensive interaction based automation. *(Marketing Cloud)*
- **Event Management & Registration:** Provide complex event management to simple event registration capabilities with integrated event check-in/walk-in tools. *(Eventbrite & Aventri)*
- **Social Media Listening:** Provide ability to listen and respond to social media mentions and reactions. across multiple social media platforms*(Marketing Cloud)*
- **Document Management/Generation:** Provide ability to store/manage/link documents related to donor, alumni, gift etc. Provide ability to digitally sign documents intended for internal and external constituents. Provide workflow/criteria based ability to generate/print paper documents for executive biographies and direct mail mass communications. *(Ninety DocGen, Conga Composer, DocuSign)*
- **Online Donation Management & Forms:** Create a robust giving portal with ability to receive contributions using multiple online channels & payment types. Provide system integrated forms for memberships and bio-demo updates. *(SalesForce, Form Assembly, Custom Apex Development)*
- **Platform Integration:** Create highly integrated donor system with direct feeds from payment gateways, giving forms, giving platforms, UCI health data feed and other internal systems. *(MuleSoft & Demand Tools)*
- **Online Communities:** Provide ability to create multiple unit/role specific online communities for donors, alumni, parents, reunion, engagement program etc. *(Community Cloud)*
- **Inquiry Management:** Provide system integrated ability to pool, track and respond to inquiries from internal and external constituents. *(Sales Cloud - Cases)*
- **Analytics & Reporting:** Provide integrated and extensive self-service reporting & advanced analytics on constituent data. *(Einstein Analytics/Tableau CRM)*
- **Grateful Patient Engagement:** Provide extensive ability to manage fundraising efforts directed towards Grateful Patient prospects in secure environment. *(SalesCloud, MuleSoft, DonorSearch & Custom Apex Development)*

ZOTFORCE TIMELINE

- **Go-Live Timeline:** April 2018 - Feb 2020
- **Post-Go-Live Development:** Mar 2020 - Feb 2021
- **Second Phase Development:** Ongoing