



CASE STUDY

As Alumni Engagement Changes, Technology Supports the Transformation





The ways alumni connect with their universities has expanded rapidly in recent years, and that expansion has driven many institutions to demand more from the technology that underpins alumni engagement.

The isolation created by the Covid-19 pandemic increased the desire for personal connections and live events, prompting an increase in alumni interested in mentoring other alumni and students, and attending reunions. Alumni relations teams also report that following the pandemic, alumni are more interested in volunteering for their universities. They are eager to engage with their institutions, and are increasingly turning to their alma maters to connect them to opportunities for lifelong learning – seeking new knowledge and skills to help them further their careers.

Establishing more personal relationships with alumni creates a long-term foundation of goodwill. “Those are very, very strong connections to build and they’re much more heartfelt and lasting than clicking ‘give now,’ and walking away,” says Zan Turvey, Director and Advancement Industry Advisor with Salesforce, the cloud-based software company best known for customer

relationship management (CRM). For colleges and universities, developing these relationships starts with building new foundations on which to support them.

At Purdue, Institutional Changes Drive Alumni Giving

Sometimes strengthening levels of engagement calls for institutional restructuring. At Purdue University in West Lafayette, Indiana, communications, alumni relations, corporate relations, and fundraising – and the data management related to those functions – have been completely reorganized. Not an easy feat for a public university with multiple campuses.

Matt Folk, President and CEO of the [Purdue for Life Foundation](#) gathered top administrators and led a massive overhaul and consolidation of advancement functions during the campus' 2020 Covid-19 shutdown. The integration included folding the alumni association back into the university (which, previously, acted as an independent body). "It was a huge overhaul in a short period of time," says Folk. Across the university system, they've fully adopted an integrated CRM.

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According to Folk, the foundation's goal is to use technology and data management to engage the university's 600,000 living alumni with personalized content instead of "spamming the world". One way Purdue is working towards this is by fully-integrating LinkedIn data with its Salesforce CRM, allowing teams across campus to track alumni interests and careers.

Purdue also uses real-time alumni engagement scores to measure and capture volunteerism, event participation, donations, reactions to communications, and tickets purchased for university events. Scores are monitored for individual alumni as well as for zip-code areas or alumni clubs, informing the university to shift

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resources to the events or alumni groups that result in higher scores. As a former corporate executive in the semiconductor industry, Folk is constantly monitoring return on investment.

He emphasizes that much of Purdue’s fundraising and alumni engagement success is due to the university’s own accomplishments: Upgrading facilities, maintaining high standards for research teaching, and improving the student experience – while, at the same time, reducing the financial costs for students and their families. “It’s so much cheaper to go to Purdue now than it was 15 years ago,” he says. “It’s crazy.”

INSEAD’s “Force for Good” Sets New Standard for Global Alumni Participation

[INSEAD](#), a global business school with campuses in France, Singapore, Abu Dhabi and a “hub” in San Francisco, faces different challenges. INSEAD is in the middle of its journey to create an integrated technology platform for alumni engagement fundraising. The school closed out a capital campaign, “A Force for Good,” that kicked off with a €200 million (\$217 million) target but closed out raising well over €300 million (more than \$325 million).

The institution was also seeking to broaden its base of donors. As an institution based in Europe with many students from countries where philanthropy is a less established concept, the business school reminds alumni that it is an independent and nonprofit entity, with no steady base of government support and no larger university to draw on for help with administrative support or infrastructure. The business school’s independence, however, allows the

institution to chart its own course; alumni appear to appreciate INSEAD’s mission to develop business as a “force for good,” supporting such missions as sustainability strategies and “nature-positive” businesses (companies that work to address their environmental and social footprint). Alumni participation that used to average around 10 percent annually grew to more than 50 percent during the capital campaign.



Emily Robin, Senior Director of Development at INSEAD, sees this fundraising growth as the fruit of a growing emphasis on alumni engagement. The school launched peer-to-peer mentoring in the fall of 2020 allowing alumni to mentor fellow alumni and students. This year, the business school launched a mobile “Learning Hub” app that gives alumni and other subscribers the ability to engage with global thought-leaders, stay up-to-date on business thinking, and develop new competencies for lifelong learning. A new digital communications platform supports personalized messaging, based on each person’s interests and location, to the business school’s alumni who are spread out over 180 countries.

Despite all these developments, Robin says INSEAD wants to keep improving technology and support for alumni engagement and fundraising. The business school recently spent six months studying ways to develop a larger, more widespread system that could “meet alumni where they are” and integrate multiple specialized functions, such as processing gifts and managing volunteers.

Advance Alumni Engagement with Frictionless Experiences

Successful relationships are as dependent on the platforms and tools that facilitate them as much as they are on the active participation between colleges and their alumni.

For institutions that want to facilitate alumni connections, improving technology is “about giving people the space, the place and the tools to do what they would like to do,” says Salesforce’s Turvey. Sometimes, he says, when alumni visit an institution, either in person or digitally, “they don’t know what they would like to do. They just know that they would like to give back beyond writing a check.”

Turvey and university advancement leaders emphasize that alumni expect the same frictionless online experience from a university that they get on a high-quality corporate website when they try to register for a university event, connect to fellow alumni, or sign up as a volunteer.

According to Turvey, when technology is deployed properly it should help advancement staff members shift from being reactionary and tactical to being strategic, forward-looking, and purposeful. For staff members handling donors capable of making seven-figure gifts, for instance, a system could suggest next best actions for soliciting a gift based on past donor behavior, philanthropic and intellectual interests, giving patterns, and email responses.

“It allows people to focus on conversations, instead of system updates,” says Turvey. Purdue’s Folk agrees, saying he would like to automate the early-stages of developing donors and use their best-performing development people as “closers instead of as openers.”

Advancement leaders have suggestions for other institutions considering reconfiguring alumni engagement and the technology that supports it.

Staff members at universities are often afraid to fail and fear they will be punished for failure, says Folk. He tries to flip that expectation and tells staff, “I want you to push the limits. I want you to fail. Then, I want you to try again. You’re not going to be punished for it. Let’s see what we can dream up and how quickly we can get there.”

For her part, INSEAD’s Robin emphasizes that the goal of improving alumni engagement can mean getting institutions to see alumni relations differently.

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