




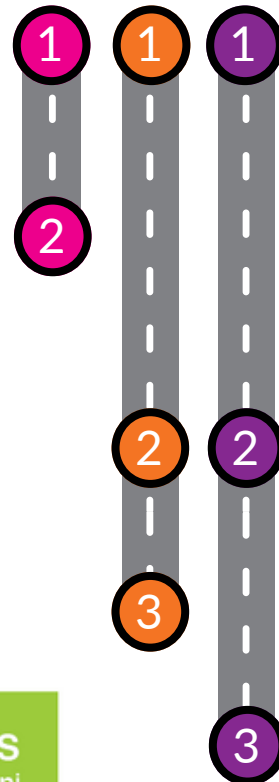
ALI CONSTITUENTS ACCESS LEARNING ROAD MAP

Last updated August 22, 2023

WHO ATTENDS? | TRAINING SESSION

LEGEND

-  University staff who interact with constituents
-  University staff who send mass email broadcasts
-  University staff who manage events (online event registrations)



Ali CRM: Fundamentals + (1.5 hours)

This basic course helps you understand advancement and foundation fundamentals, navigation, how to customize Ali, the four types of constituent records, how to add personalized 1:1 meaningful interactions with constituents, and how to find resources and help.

Contact: Ashley Wagner, Learning and Development Program Manager
training@nufoundation.org

DIGITAL ENGAGEMENT TOOLS

Ali List Builder (1 hour) *Ali CRM: Fundamentals + is a prerequisite*

This self-serve widget within Ali helps you build lists of alumni, donors and friends for group emails and events.

Emma Email Tool (1 hour) *Ali List Builder (ALB) is the prerequisite for Emma*

This integrated app allows you to import an ALB list and send group email communications to alumni, donors and friends.

AlumniQ Events Tool (1.5 hours) *ALB is the prerequisite for AlumniQ*

This integrated app allows you to create and manage online event registrations for no-fee events with the option to use an ALB list to send invitations.

Contact: Deborah Johnson, Asst. Dir. of Digital Platforms
alicrm@nufoundation.org



Constituent Records | Contact Information
Relationships | Education | Interactions | Communications
Alumni Engagement | Recognition Programs | List Builder
Foundation Liaison, If Applicable