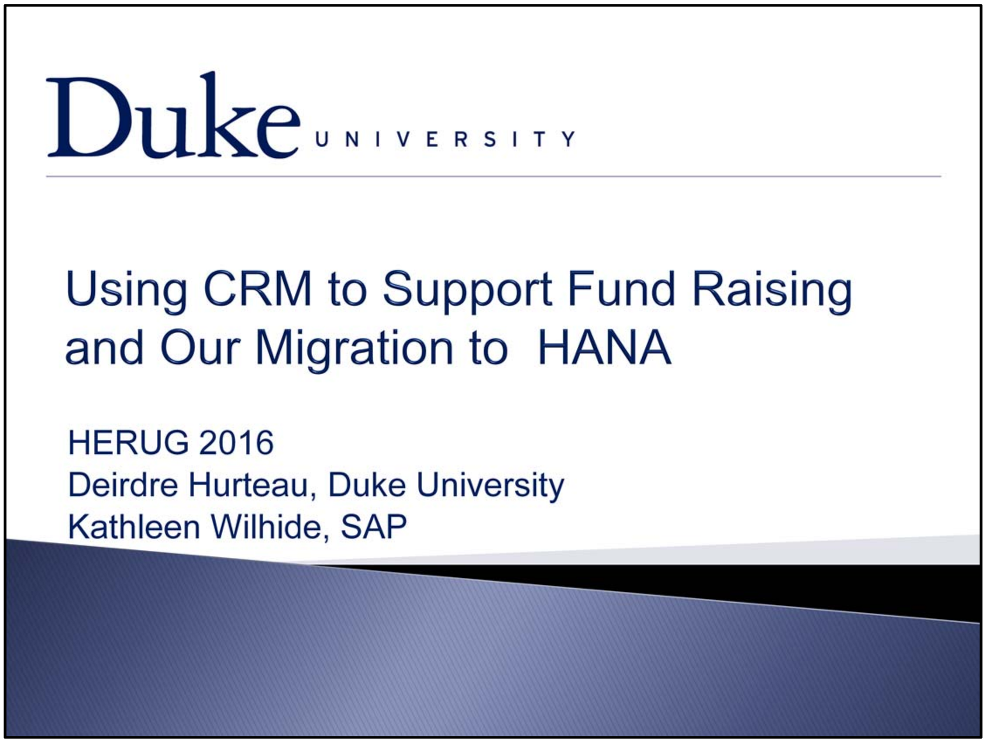


Welcome

Introduction – I'm from Duke's Administrative Systems Management team, I'm the lead for Duke's CRM/FRM system support

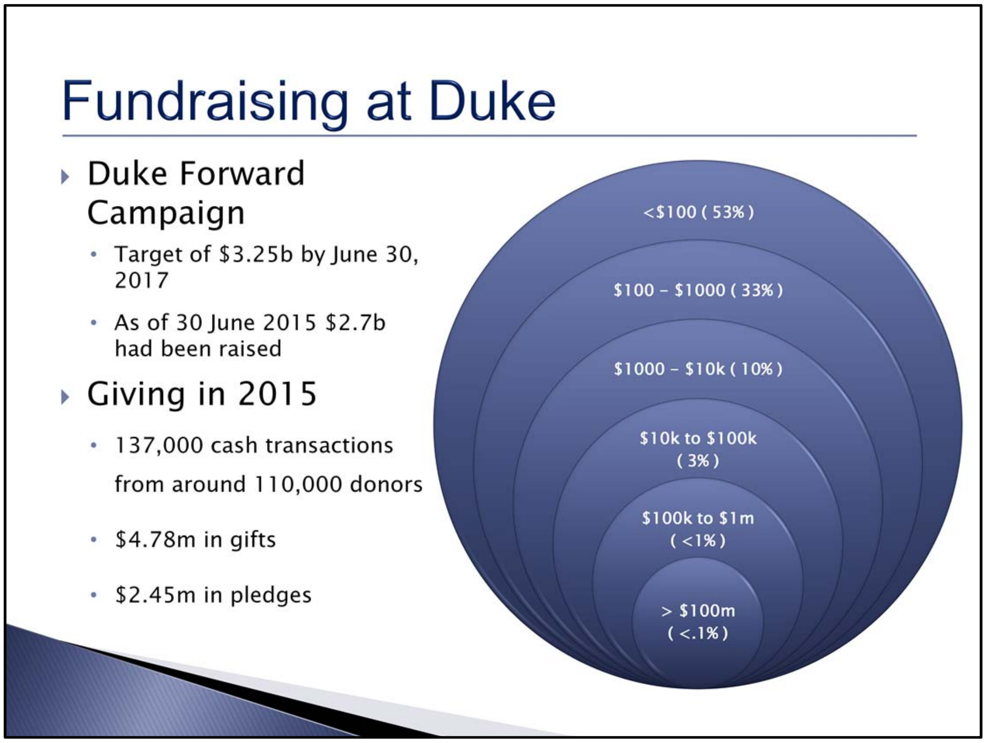
Duke University and Duke Health

- Private Liberal Arts and Research University located here in Durham, North Carolina
- 10 Colleges & Schools
- 15,000 students – 43% undergraduate
- 38,000 employees – including Duke Health and Faculty
- $5.4 billion in revenues in FY2015
- Live with SAP in 1999

Duke University and Duke Health

2010 & 2015 NCAA Basketball Champions!

For those who haven’t heard ……

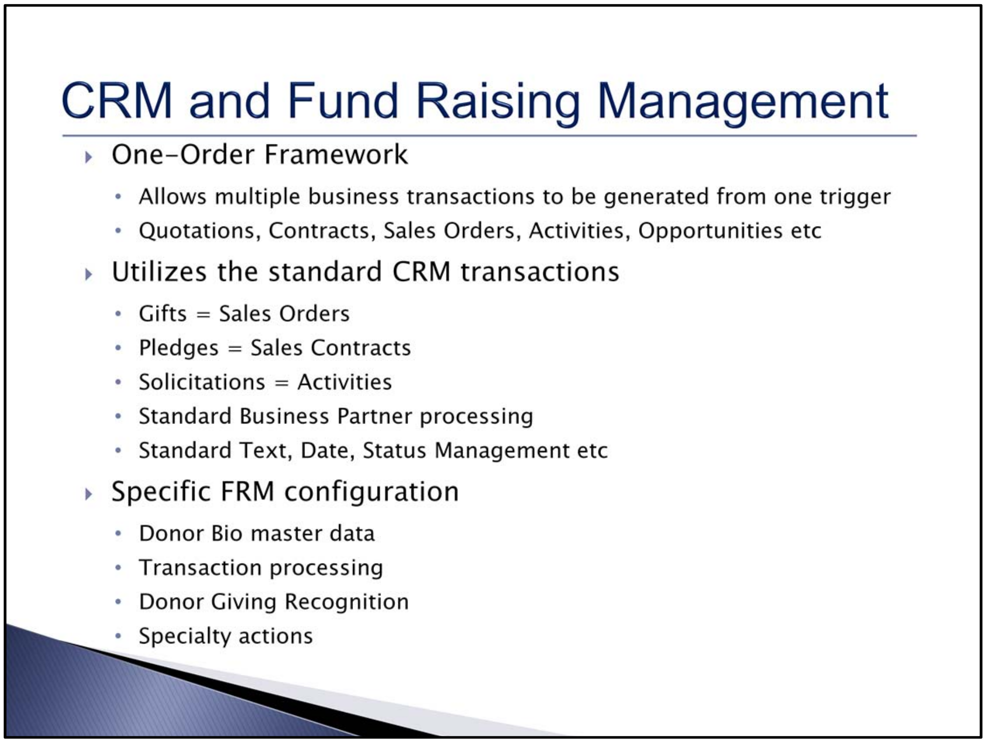


Duke Forward is our active university wide campaign.
Officially kicked off in 2010 with the health system going a year earlier

Almost 20% of donations come from Alumni; around 10% from The Duke Endowment

790,000 donor records with 160,000 Alumni records

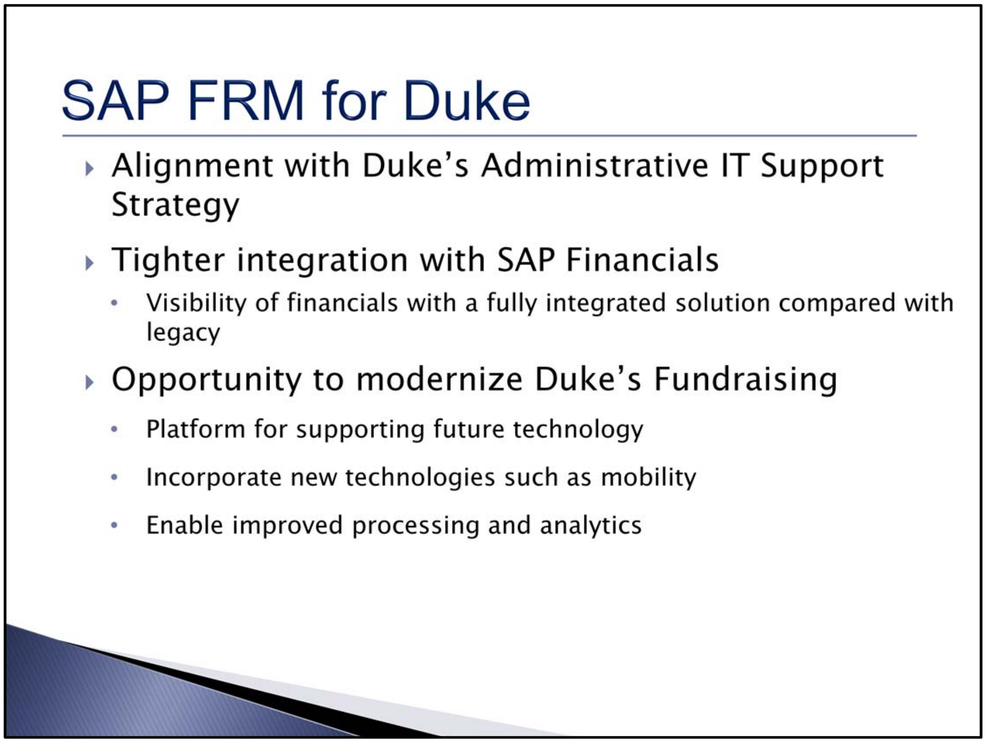
53% of our transactions come from gifts of $100 or less (around 72,000)



Standard CRM configuration needed to underpin the fundraising management functionality

1. One Order Framework – flow through each related transaction. The fund code on a pledge line links to the gift line, links to a matching claim line, links to a matching gift line

2. Specialty actions – such as pledge schedule line create (which transactions to have payment schedules generated), tolerance postings – the % that generate balance write off

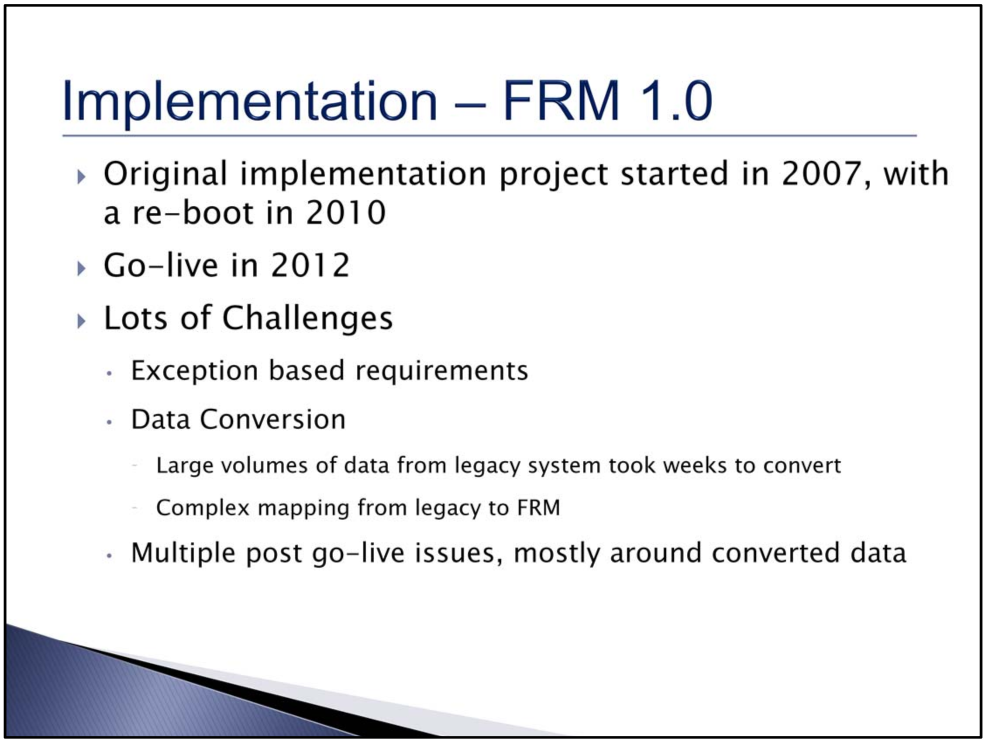


1. Duke was already an SAP shop – initial implementation back in 1999

1. The university wanted to bring all administrative systems under one group – employ best practices and have a consistent approach to support. Also introduce a uniform methodology for moving changes through the landscape

3. The legacy system was main frame based. Duke wanted to take advantage of the future improvements in technology SAP could provide. HANA is a good example of that

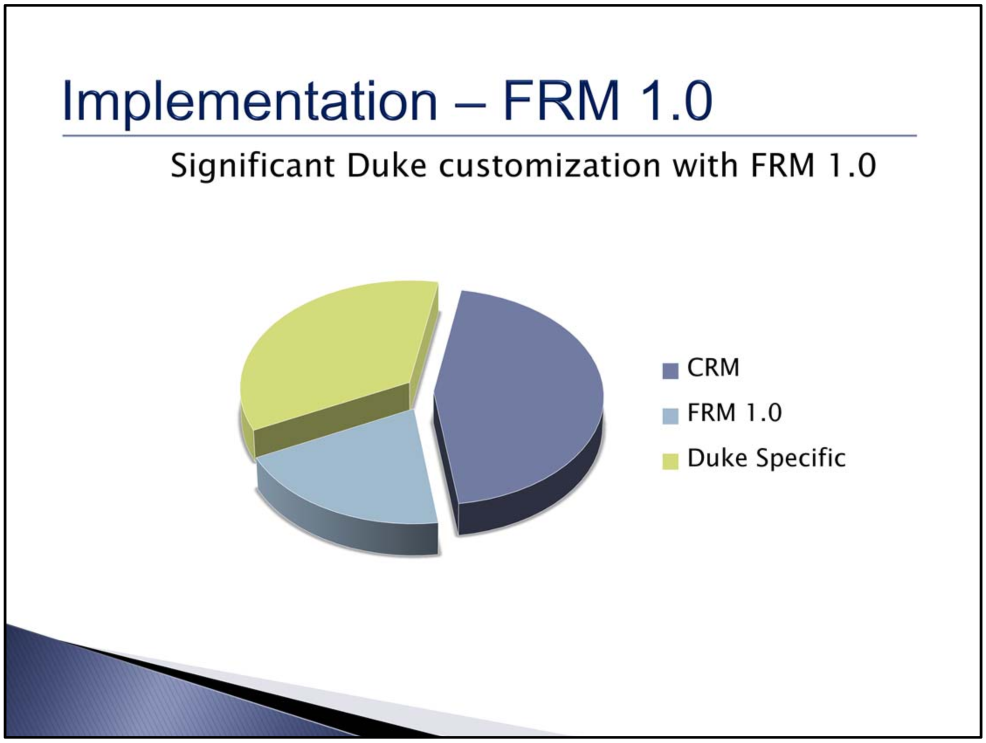
In general, moving to SAP FRM has provided Duke an opportunity to really use the system as an enabler; the system is supporting the future focus of the Development Office



Data Conversion:

3.1 We converted everything from the legacy system to FRM 1.0 – all the way back to 1970. Around 725,000 entity records and almost 6 million transactions

3.1 Because of how long it was going to take, the focus became getting the data into the system as quickly as possible. As a result, we are still dealing with converted data issues almost 4 years on. Valuable lesson learned



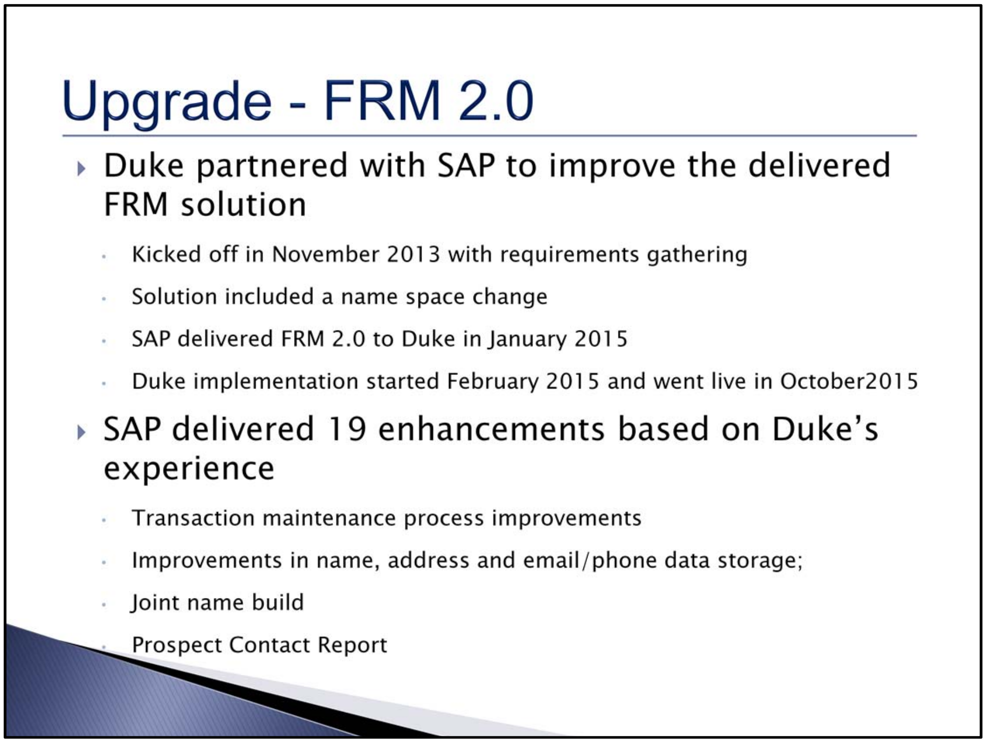
About 1/3 of the what we went live with was customized by Duke

Exception based requirements meant we departed quite a lot from the delivered product, especially around donor record data.

Even simple things like how email was stored because a problem that required a custom solution to separate email addresses from standard addresses.

Prospect management was probably the area most heavily customized to meet the requirements of the Development Office.

Much of the prospect management was still being performed outside SAP with exports to a shadow reporting system each day to accomplish what was needed.



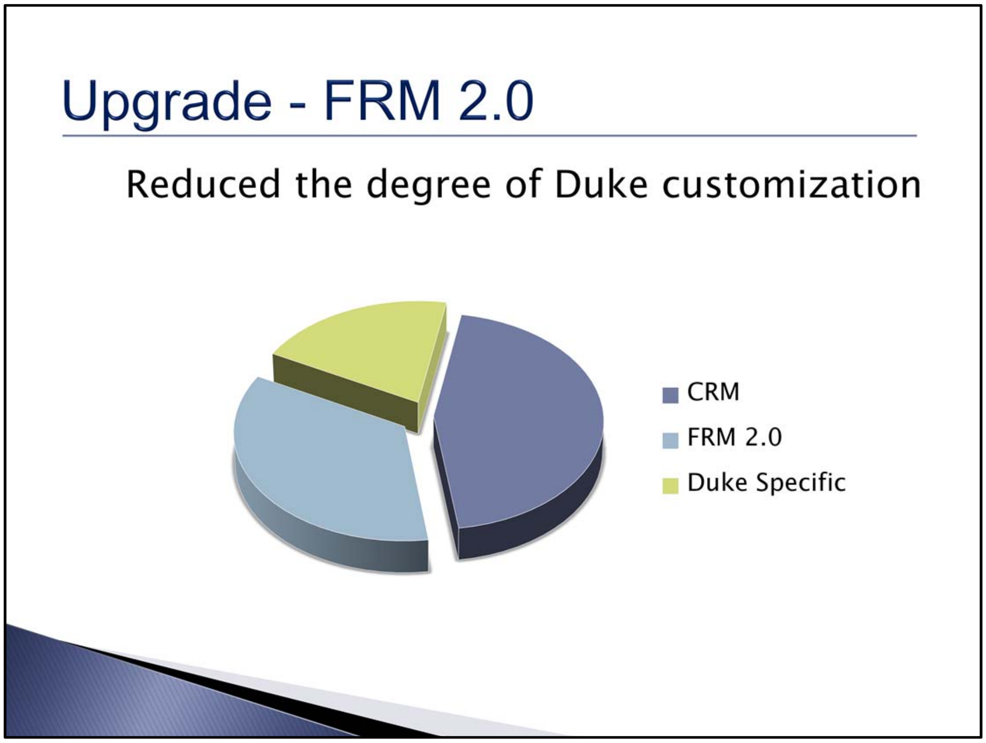
1. REQUIREMENTS - Worked with a small project team in SAP's Custom Development group. Excellent experience.

2. REQUIREMENTS - SAP spent a lot of time to really understand our pain points and collaborate with Duke on solutions.

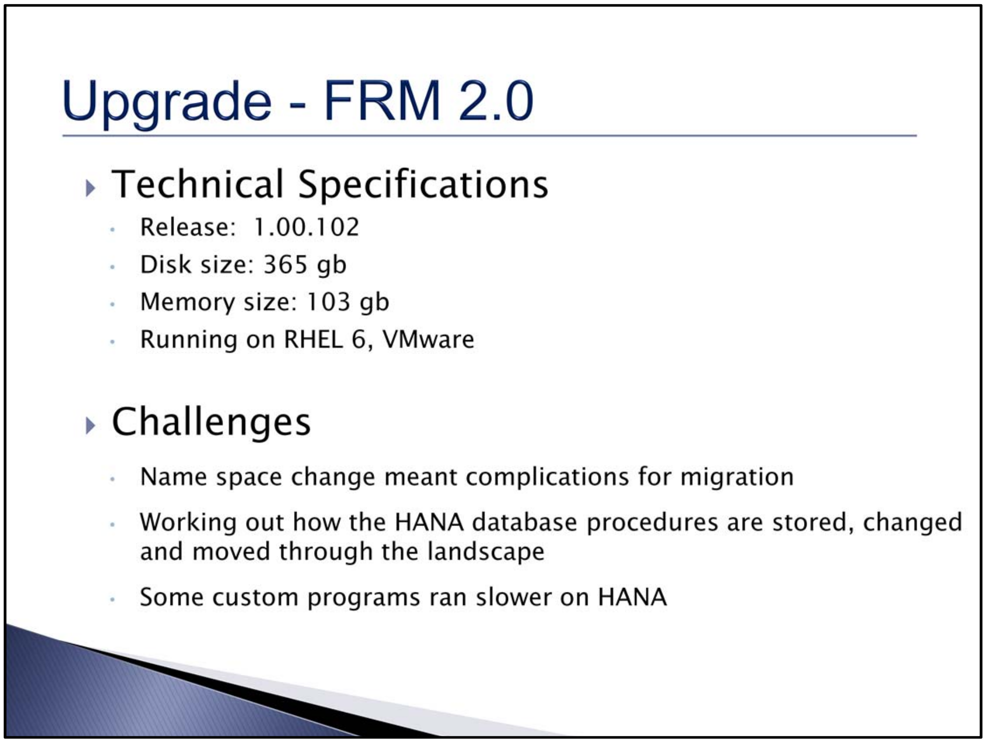
3. MAINTENANCE - Transaction maintenance is a large part of giving management. Change transactions back as far as the 1970's

4. JOINT NAME BUILD - Use BRF+ tool to manage the joint name build functionality

5. PROSPECT - Prospect Contact History Report – SAP incorporated the Contract Report in FRM 2.0. Used to notify the various interested parties in the Development Office when a prospect contact has been made.



The degree of Duke customization decreased to more like ¼ of the total solution
We are now under a maintenance agreement with SAP for support
Up to date with support packs



The upgrade project ran well, but that's not to say there weren't any challenges

1. NAME SAPCE - Engaged the SAP SLO (System Landscape Optimization) team for data migration.

'Lift and shift' from the oracle database to HANA

Migration completed in around 10 hours

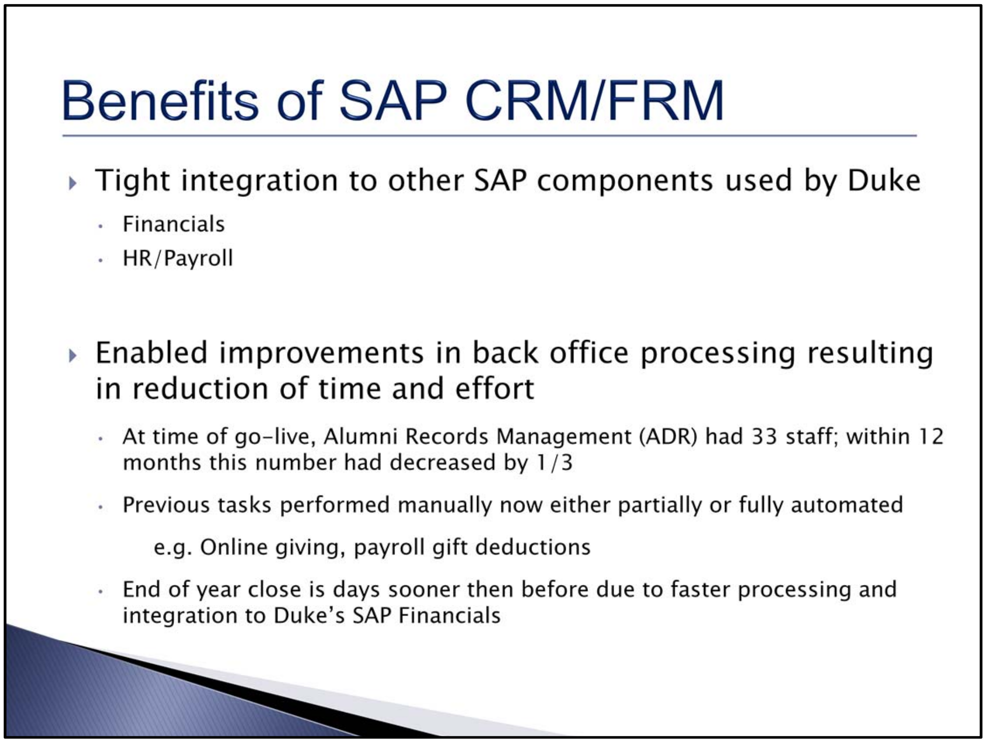
2. CUSTOM CODE - These procedures live at a "lower level" than the ABAP stack (at the database layer) and therefore not all governed by version control and the transport management system the way data dictionary objects and ABAP code are.

Ended up using import/export functionality. This was somewhat prone to error and corrupted our system when we didn't get the dependencies right.

3. Some of our programs had unnecessarily long field lists which meant more columns being returned so was slower.

3. Also nested SELECT statements within LOOP statements seemed to perform more poorly

Once the coding was improved on these programs everything ran as good or better then pre-HANA.



1. INTEGRATION - CRM billing allows for real time updates to the ledger (previously done with journals)

2.1 EFFICIENCY GAINS - 33 Temp and permanent staff – reduction was mostly in temps That's a direct decrease in the cost of processing and therefore increased gift value

2.2 EFFICIENY GAINS - Online giving – at time of CRM go live, all online gifts printed out and processed manually. Now the donate to receipt cycle for online gifts has around 60% of transactions processing without anyone touching it. Last calendar year we had 26,500 online gifts so huge reduction in effort.

2.3 EFFICIENCY GAINS - Payroll Gift Deductions – Duke enhancement that allows employee to manage their gift deductions directly. Built with Webdynpro, fully automated from the entry made by the employee through to the payroll deduction

Benefits of SAP CRM/FRM

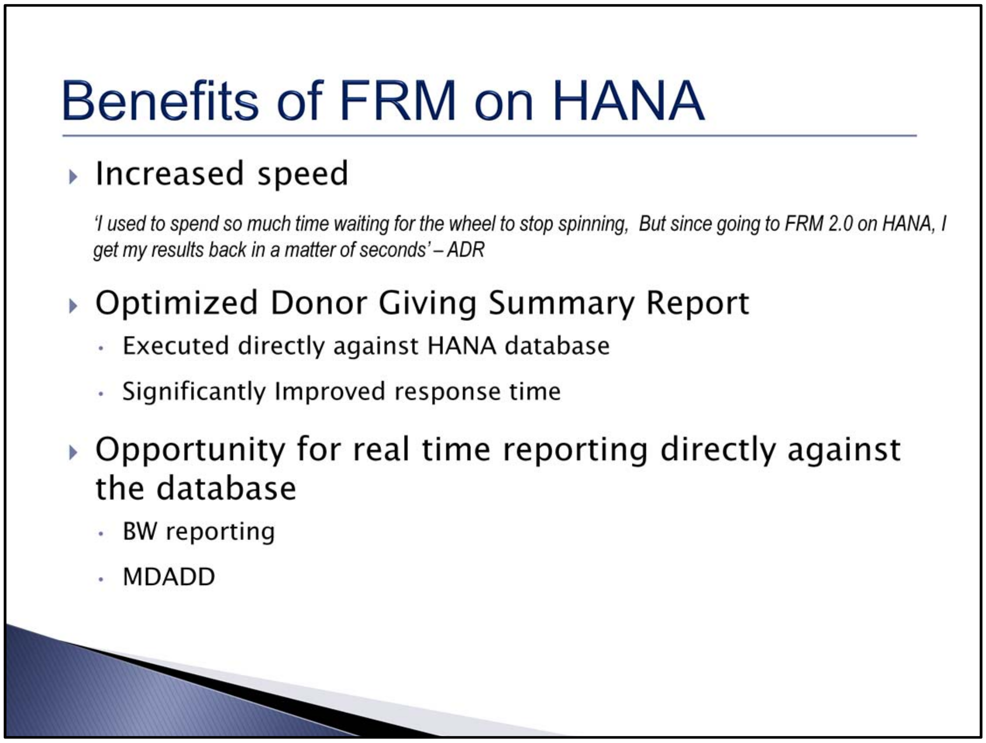
- Better, faster, more reliable data
  - Higher quality of data available in shorter period of time
  - Directly translates to improved reporting
  - Development Officers have access to up to the minute information for decision making
  - Less time spent in processing and reconciliation
  - More time in analytics
  - Automation reduces human element, therefore less opportunity for error
  - Access to other SAP tools like FIORI

The end result – better, faster, more reliable data for decision making

1. PROCESSING TIME - ADR staff are starting to shift their focus to more to error and exception management rather then keying data.

2. HUMAN ERRORThe less a person needs to touch a transaction or donor record the less chance of error

3. With SAP, we have a standardized data model with inherent governance, reduction in production support required for bad data



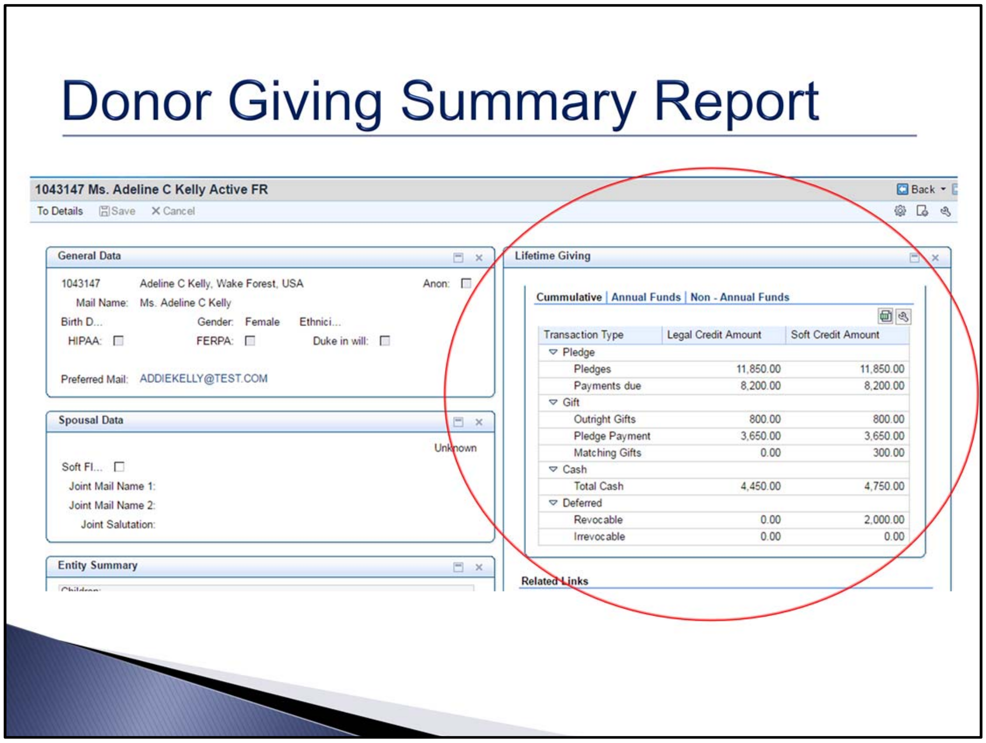
1. SPEED - Even though not optimized for HANA we've got significant increases in speed

2. GIVING SUMMARY - One of the big issues was the summary of donor giving.

Took considerable time to pull up a donor record with a lot of transactions because it needed to build the giving summary as part of the display.

Eg Various Donors – would time-out prior to HANA, now returns in 40 seconds

3. MDADD – duke developed mobile tool for Development Offices in the field



Snap shot of the donors giving for the donor by transaction type.

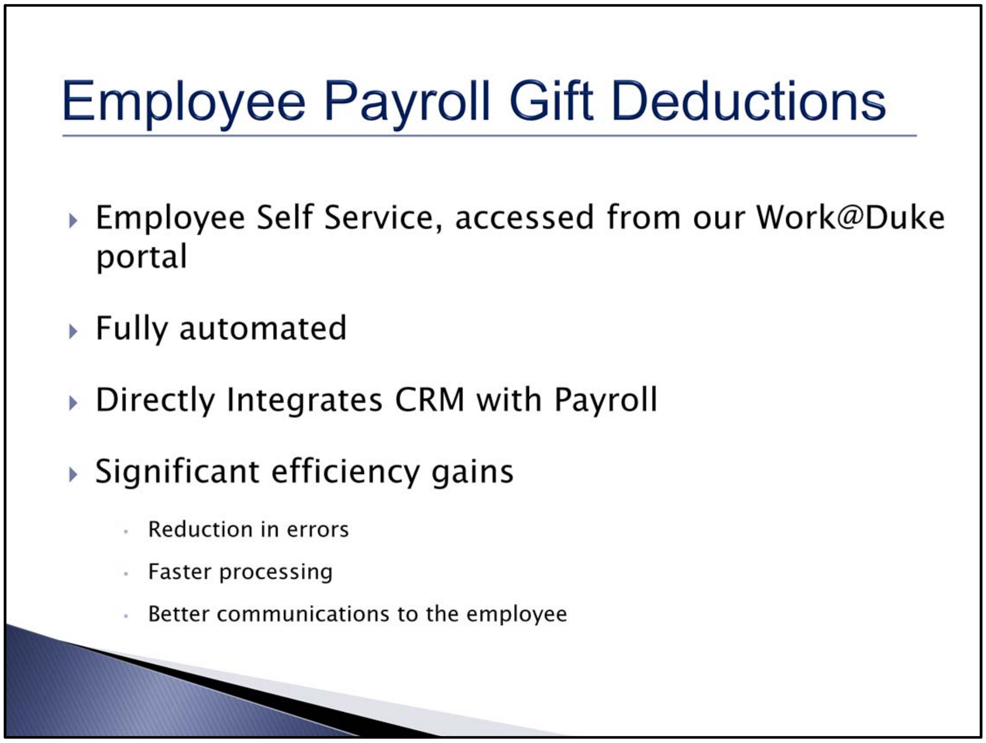
Shows pledge and gift information.

Legal verses soft credits – a legal credit is something you can deduct on your taxes; a soft credit is where a gift is ‘counted’ toward the donor e.g. a spouse

Also shows any planned giving of the donor

Further detailed by Annual fund and non-annual fund

Plans to give users ability to filter by school



Payroll Gift Deductions is a good example of what Duke has been able to accomplish with SAP FRM

1. ESS - Not true ESS, but as far as the employee is concerned there is no difference

Employee can control when their donations start and finish, and where they go. Only limitation it isn't retrospective

2. AUTOMATED - Only 1 manual step, to check the expected changes prior to updating payroll. Very cautious about making changes to a persons pay.

3. EFFICIENCY GAINS - Previous to this solution, ADR had an FTE processing payroll deductions and bank drafts

Records were kept in spreadsheets on a desktop.

Processing Payroll Gift Deductions and Bank Drafts are now completed in a matter of hours each month and all data is stored securely in SAP

Employee Payroll Gift Deductions

Payroll Gift Deduction Management

Welcome Deirdre M Schumann
You are currently paid Monthly

Giving to Duke

Designation	Amount	Start Date	End Date	One Time
No deductions for Giving to Duke				

New Recurring | New One Time | Reset

Gifts to Doing Good in the Neighborhood

Designation	Amount	Start Date	End Date	One Time
No Deductions for Doing Good in the Neighborhood				

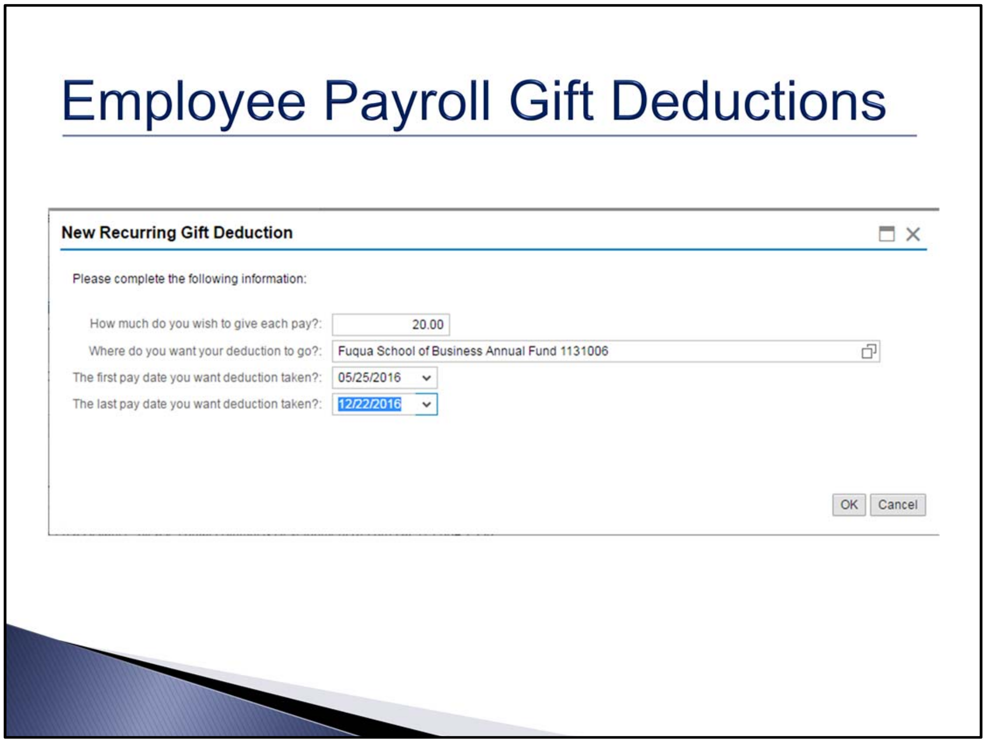
New Recurring | New One Time | Reset

Instructions

Expand the Instructions tray for more details on adding or changing your payroll deductions.

If you have any questions or need assistance, please contact Alumni & Development Records at 919-684-2338.

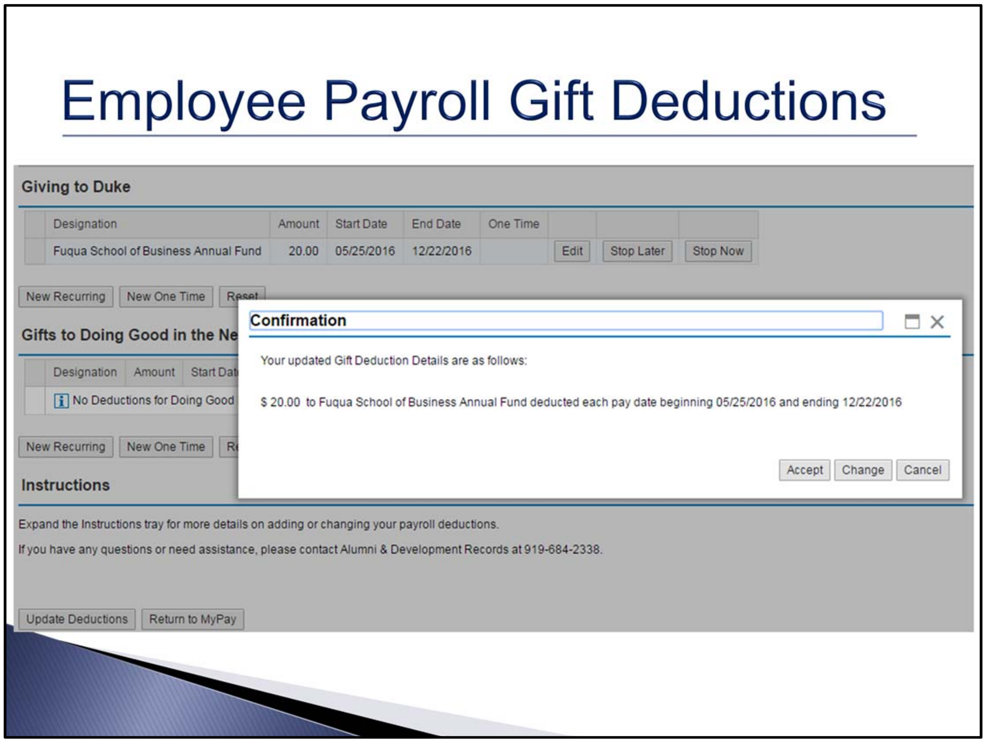
Update Deductions | Return to MyPay



1. Table of eligible fund codes for selection – type ahead functionality

2. Defaults to the first available pay period for the deduction based on if the employee is monthly or bi-weekly. Can be future dated

3. Allows employee to select an end date, or have it go on perpetually.

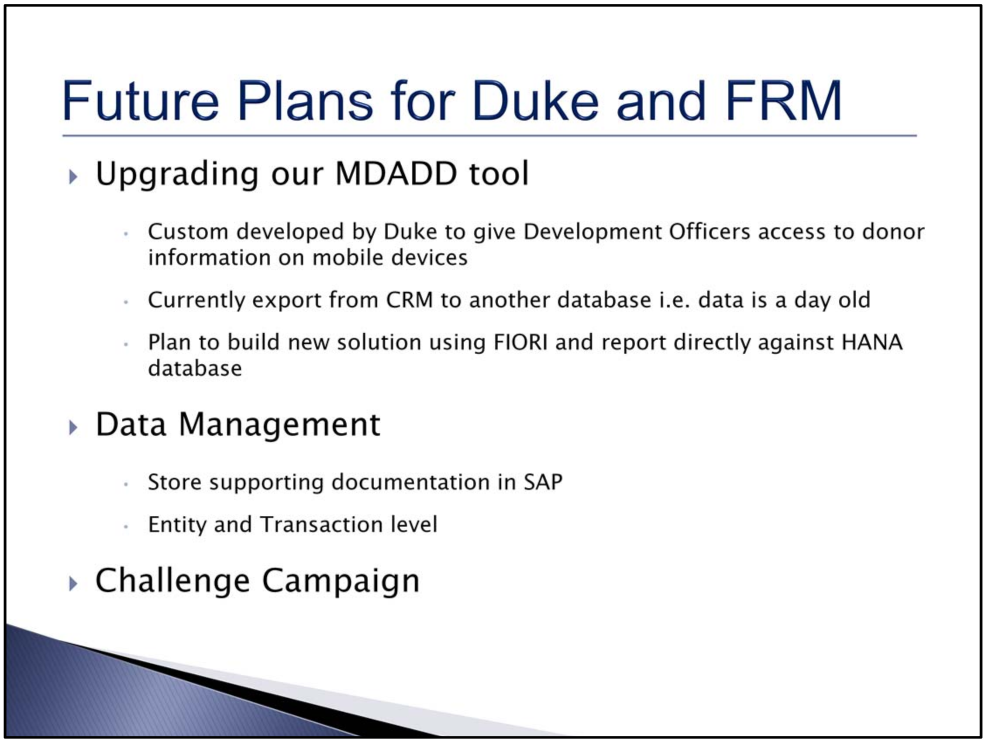


1. The employees selections are showing in the relevant wage type. When they are satisfied with how they have things set up, they get a confirmation message to accept or change

2. This updates a custom table in CRM.

3. Prior to each pay run, a custom program is executed in ECC to pull the changes into payroll.

4. A file of deductions taken is picked up by CRM after the pay run and processing as gifts.



1. Goal is to give development officers up to the minute access to a donors information before heading into a meeting:

    What was the last gift given? Where to?
    Do they have open pledges? Are they in arrears?
    Names of the spouse and children
    Do they like golf?
    What are the details of the last ask for a donation?

2. Will be evaluating the SAP Data Management solution (along with others) against the requirements

3. Developing a custom solution for managing donor challenges.

4. Will utilize the delivered gift and pledge transactions

5. Create tools for the development office to allocate match amounts.