



Activate Student Data to Engage Donors

The New Navigate360 Advancement Success CRM

Giving campaigns are essential for growing your donor pipeline and fostering alumni relationships. But for advancement offices operating with limited resources and capacity-constrained staff, how do you run personalized, engaging, data-informed campaigns at scale?

You Don't Have Enough Staff...

Advancement Teams are Understaffed and Stretched Thin with Time-Consuming Tasks



...and Your Staff Don't Have the Right Tools

Existing Solutions Are Not Optimized for Busy Staff to Run Personalized Campaigns at Scale

Traditional Advancement CRMs:

- Overly complex, requiring specialized staff to manage
- Inflexible, rigid, overly complex workflow functionality
- Costly to implement and maintain
- Limited or no pass-through to other campus systems, leading to data loss
- Poor customer service and too much system downtime
- Limited reporting capabilities

Introducing Advancement Success for Navigate360. This module for the Navigate360 platform seamlessly extends our proven recruitment and student success capabilities to advancement teams within a single system. This powerful new technology immediately delivers the capabilities you need for better giving campaigns:

✓ A **complete history** of your students and recent grads

✓ AI-powered, proven **workflow tools** empower staff to run better campaigns

What Does Advancement Look Like with Navigate360?



Centralized student, alumni, and donor **data**



Automations for segmented outreach at scale



Built-in AI to create campaigns, generate reports, and more



User-friendly **tools** to process gifts and track pledges



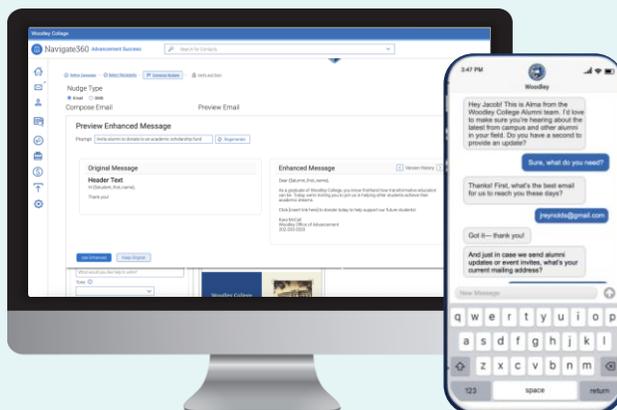
A **cohort** of like-minded peers



Expert **guidance** every step of the way

Accelerate Your Advancement Work at Scale with Navigate360's People-Centric AI

- ✓ Use the profile summarizer to **quickly learn about potential major donors** before a conversation
- ✓ Generate data-informed **custom solicitation letters** by segment
- ✓ **Generate reports** on what **engagement tactics** are most effective
- ✓ Use **sign-in data and engagement scoring** to recommend personalized follow-ups after events



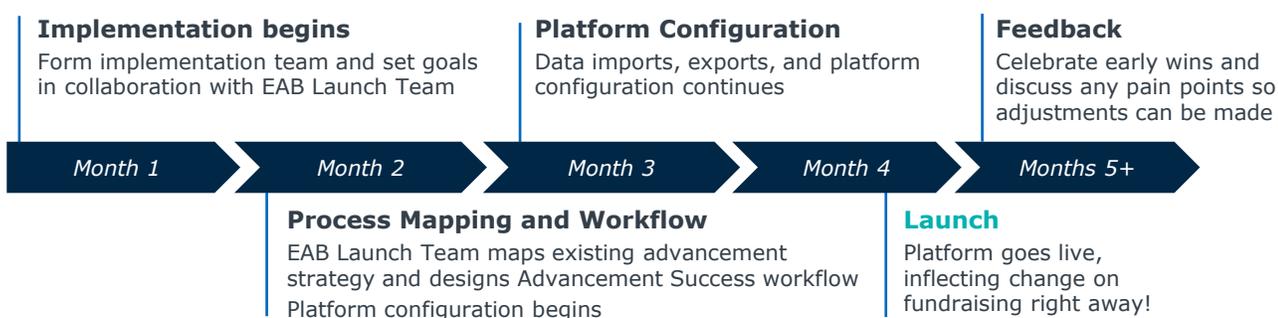
With AI Agent Add-On:

- ✓ Create an autonomous fundraiser chatbot to **engage website visitors** and guide them to your donation form
- ✓ Instruct the AI agent to **contact alumni**, collect current contact and employment info, and update your records

The Advantages of Navigate360 Advancement Success Partnership

| Challenge | Solution with Navigate360 Advancement Success |
|---|--|
| Current tech/process is clunky and cumbersome | Integrated, User-Friendly Platform <ul style="list-style-type: none"> Centralized, customizable dashboard with all donor and alumni information in one place Easy contact reporting Easy note-taking and record updates Seamless gift processing with integration to financial systems |
| Alumni engagement sits within the institution, but fundraising sits within the foundation | Role-Based Permissions <ul style="list-style-type: none"> Ability to create role-based permissions governing what users can see in the platform |
| Difficulty with reporting and audience segmentation | Advanced Segmentation and Reporting <ul style="list-style-type: none"> Dynamic reporting engine with easy-to-use filters Pre-built segmentation templates for events, campaigns, and stewardship AI-powered report finder |
| Limited fundraising scope and scalability | Supercharge Fundraising & Outreach <ul style="list-style-type: none"> Integrated communications tracking for personalized stewardship Custom event and messaging campaign tools that enable targeted, high-touch engagement Two-way texting |
| Limited budget, time, and staff resources | Accelerate Operational Efficiency <ul style="list-style-type: none"> Clean user interface for rapid and scaled adoption All advancement workflows in one intuitive system |

Expedited Implementation Timeline



To learn more:



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