

## **CRIMSON – Instructions for Gateways**

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IUAA/IUF use a Customer Relationship Management (CRM) database system called 'Crimson' for storing contact details and tracking interactions with alumni, donors and prospective donors ("prospects"). As you regularly come into contact with alumni and occasionally with donors/prospects we would like your assistance in helping populate Crimson with up-to-date information.

The information you provide will be used by Fred Perry or members of the OVPIA senior leadership team when we have future communications with these individuals. From time to time, an alum may contact IUAA, OVPIA or one of the academic units, and it is helpful for whatever IU employee here in Indiana dealing with a new contact by an international alum to be able to look up the person in Crimson to see that he or she has been engaged in Gateway activities.

To this end, when you have a significant interaction with an alum or prospect we would like you to complete a short report using the template attached. Your completed forms should be emailed to Rebecca Barrett in our office (cc'd here). You may do this on an ad hoc basis, but please submit reports no less frequently than once per month. Rebecca will then enter the information onto Crimson..

What constitutes a significant interaction will require some judgement on your part. It should involve at least a phone call or an in-person meeting where something substantive was discussed. For instance, you may meet an alum who conveys that he or she just got a new job or some other life change of note (marriage, death, child off to college, moving to a new house/city). It is very helpful in the case that you receive a new business card, e-mail or address for an alum that we have Rebecca check it in Crimson to see if it needs to be updated. I can anticipate that you may have extended interaction if an alum is providing you with help on a specific project – advising about networking connections, facilities, services, etc. So the idea of an interaction is that there is a real bit of news or substantive engagement with IU's work at the Gateways.

In your case you may also meet with alumni/prospects in-person at Gateway events (e.g. admissions events, public lectures etc) or alumni gatherings outside of the Gateway, where you just have the person's name on a list, but no real interaction with them beyond common niceties. In that case, you should include notation of which are alumni in the Gateway event attendance report that you are already compiling, but an individual Crimson interaction report is not needed. We hope that soon Crimson will have the capacity to upload event attendance so that we can track how many Gateway events an alum has attended, but unfortunately we are not able to do that yet. Note, however, that it is the responsibility of IUAA chapter presidents to submit this information for official alumni events, not yours. Going forward (and particularly in the early stages) I suggest if you are not sure whether an interaction merits a report then please check with Fred Perry. As always, if an interaction requires some action by me or Fred to follow up, please e-mail us right away, do not wait expecting that we will see it on the Crimson report.

## **Crimson Interaction Template**

1. First name:
2. Last name:
3. Maiden or other name used while student at IU (if applicable):
4. Year of graduation (if known):
5. Degree (if known):
6. Date of interaction:
7. Owner (name of IU employee who had interaction):
8. Contact method (phone call, electronic, personal visit, event):
9. Summary (descriptive title of interaction):
10. Comments (description of interaction, important points and follow up actions):