

# Immediate Access to Current Advancement Data

## Lehigh University

### Challenge

Quick and consistent access to data is key to the success of Lehigh University's Advancement Office (Lehigh). Using multiple applications, including pure SQL, Access and Oracle Reports, made it difficult to get information quickly. Creating reports required a technical skillset which limited the task to only IT members. And the time-consuming process often made the reports out dated and thus unnecessary. The Advancement Office staff wanted a user friendly reporting solution that gave real time access to data. The search began for one product that would meet all of their needs at a cost effective price.

### Solution

Lehigh recognized Argos, the Enterprise Reporting Solution from Evisions, as the solution to improve their access to Advancement data, as well as the quality of the data.

Argos is used in many more ways than Lehigh originally anticipated. For instance, Argos provides for a customer relationship management system (CRM) containing tactical and detailed reports along with a 360 degree view of their customer/constituent base. The CRM includes a prospect finder, ability to enter call reports, online & pre-formatted donor profile reports and dashboards that are customized to each Advancement Officer. Dashboards give immediate at-a-glance views providing drill down capability to information on progress towards donation goals, pipeline and more. The data is very detailed including information about food allergies, t-shirt size, children names and any other unique facts allowing for personalized interactions with prospective givers and alumni. Advancement Officers can also track account information such as giving history, activity history, how first contact was made and next required steps.

The package of reports takes care of 90% of the Advancement Officer's daily needs making it a one stop shop for instant, up to date access to detailed information, accessible anywhere at any time.

With Argos, Lehigh makes data driven decisions with precise analysis of donation trends, key initiatives towards goals, proper donor identification and charitable commitment funnels, just to name a few. Lehigh's business rules are also enforced with Argos' capability of ensuring accurate data entry. By doing



#### Lehigh University

Main Location: Bethlehem, PA

Type: Private

Campuses: 1

Students: 7,000 +

Faculty/Staff: 650 +

Undergraduate Majors: 90

Graduate Programs: 40

Year Founded: 1865

Note: Ranked in the top tier among national research institutions in the U.S.

[www.lehigh.edu](http://www.lehigh.edu)

“ The Lehigh Alumni Relations Office uses a constituent relationship management model to assess alumni connectivity, activity and ultimately philanthropic support for our great university. The Argos platform has allowed us to pull, synthesize and analyze data in ways only dreamed of in previous years. Our successful achievement of yearly stretch goals and our strategies for increased participation are directly related to our use of Argos. ”

Bob Wolfenden

AVP for Alumni Relations and Annual Giving

# Snap Shot: Immediate Access to Current Advancement Data

## Solution (cont.)

so, the cumbersome task of reviewing each newly-entered field is eliminated. This safeguard maintains clear, accurate data, resulting in time savings and staff confidence in the information they're using.

Gone are the days when Advancement Officers manually research call reports one at a time. With the simple click of a button, the information is readily available. Fulfilling data requests are no longer the responsibility of an IT staff member. Advancement Officers can now use Argos to access any information right when it is needed. The quality of donor information has been greatly improved and they now know who the ideal donors are to contact.

Lehigh has 40 scheduled reports emailed campus wide on a weekly basis. Daily staff time savings of 80% has been achieved with the Scheduling and Delivery feature in Argos. No more manually extracting information, formatting and emailing reports to Advancement Officers and management. Lehigh now automatically emails tailored reports such as gifts that are entered in each day, personalized reminders, call reminders, prospect lists and any other requested information.

Lehigh's approach in Advancement is more strategic and proactive now than ever before. Argos has proven to be a user friendly reporting solution for Lehigh. In just two years with Argos, Lehigh has accomplished more towards their goals than with their prior reporting software. Argos has improved the quality and access to data, saves time and satisfies all of Lehigh's reporting requirements.

“ Argos assists me in monitoring staff performance and gift processing entry. We have been able to reduce the amount of paper previously used by our department now that Argos reports are emailed to our respective areas. And we are able to proactively enhance our matching gift program by using Argos to report on various employment and giving parameters. ”

Karen A. Sims

Director of Information Processing

“ Argos helps me keep the pulse of my many volunteer groups. It provides me a user-friendly interface, that allows me to search on just about any question I have as I deal with over 1,000 volunteers. ”

Jessi Schimmel

Associate Director, Alumni Association



## About Argos

Making sense of all of your data is a necessary and typically painful task. Evisions takes your pain away with Argos, our enterprise reporting solution. You need access to information in order to make better and timelier decisions. Argos provides the insight you need in a single, feature-rich, user-friendly, easily implemented tool. Argos effectively meets reporting needs from simple ad-hoc queries to advanced dashboards and data cubes, while taking the majority of the workload off of your IT department. Argos offers the lowest total cost of ownership with its enterprise license allowing for an unlimited number of users, database types and connections. Evisions focus on the speed and ease of implementations means you can realize the benefits of Argos quickly. With an unlimited number of users, you can roll out all types of reporting to your users without additional cost. Utilizing the Evisions CO-OP User Community, an on-line library that allows Argos users to collaborate and share DataBlocks and reports, you can start reporting out of the box.

For more information about Argos, please visit: [www.evisions.com/argos](http://www.evisions.com/argos)



Enterprise Reporting Solution

## About Evisions

Evisions has been building great products and delivering fantastic service since 1998. We have always maintained our unique approach to software development and our passion for doing business the "Evisions Way". We look beyond the obvious to find the bigger solution - the one that tackles our clients most pressing needs, both now and well into the future. Everything we do - our research, products, services and support - is geared towards ensuring the success of our clients. We truly believe great relationships make all the difference and that our clients are part of the Evisions team. Over 800 organizations worldwide use our products including ones in Higher Education, K12, Utilities and Government.

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